



Novtel[®]

Vehicle Hire





The Basics of Novtel Vehicle Hire



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Introduction



Introduction

This document is intended to give a quick overview of the basics of Novtel Vehicle Hire.

However: Please note that Novtel has a wide range of capabilities and is feature rich.

Feel free to request a product demonstration for more details.

Third Party Integration

Novtel Vehicle Hire manages your fleet with ease, and integrates with:

- ✓ Microsoft Office
- ✓ Sage Pastel Partner and Xpress
- ✓ Sage Evolution
- ✓ Webfleet
- ✓ Novtel Access Control
- ✓ And Novtel Relations Management

Multi Branch Management

Novtel Vehicle Hire supports multi-branch management where a vehicle can be checked out at one branch and checked in at another.

Multi-Currency

If the Multi-Currency Module is installed and active in Sage Pastel or Evolution; different currencies have been set up and exchange rates updated, a specific foreign currency can be linked to the Customer master file in Novtel when the Customer is created.

In Novtel, Invoices and Statements will be produced in the home currency, BUT in the financial system, the Invoice will be produced in the foreign currency linked to the Customer's master file.

Customer Categories

We recommend that 'Customer Categories' are set up in the financial system in order to link the relevant Category to each Customer master file in Novtel to obtain a rental statistics report based on Customer Category.



Introduction

Reservation Statuses

On the Grid, the status of a reservation can be tracked by means of specific status colours linked to it – as indicated below:

<input type="checkbox"/> Cancelled	<input type="checkbox"/>
<input checked="" type="checkbox"/> Provisional	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Confirmed	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> On Rent	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Termed	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Non Rev	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Non Rev Return	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Paid	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Pax Container	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Replaced	<input checked="" type="checkbox"/>

Agents and Commission

Agent Codes can be set up in the financial system, and commission structures set up.

Edit Sales Analysis Codes

Add

Edit

Delete

Save

Reject

Search

Code

Name

First

Prev

Next

Last

Sales Analysis Code

1

Blocked

☐

Description

Test Agent

Commission

This Year Totals

Last Year Totals

Notes

Picture

Pay Commission On

Gross Profit

Sales

Range	Periodic Target Amount	Commission %
From 10 000.00 to 19 999.99	10 000.00	5.00
From 20 000.00 to 39 999.99	20 000.00	10.00
From 40 000.00 onward	40 000.00	20.00
		0.00
		0.00

Copy Commission Structure

Paste Commission Structure

These codes will be available in Novtel to be linked to a reservation.

Complete commission and sales reporting are obtained from the financial system.

In Novtel, a Rental Statistics Report can be obtained to list the total 'sales' per Agent.

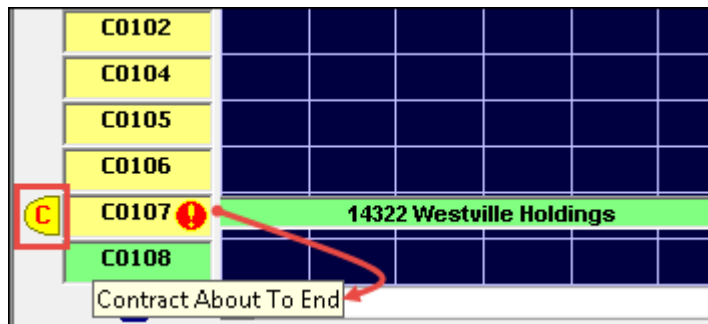
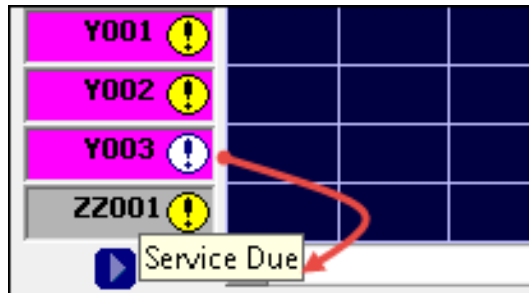
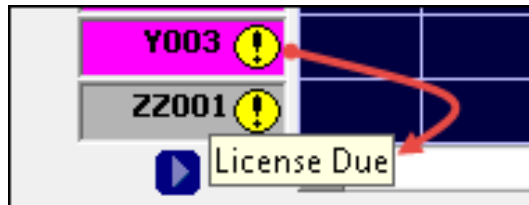


Introduction

Reminders

Novtel incorporates the feature to notify the User prior to an expiring licence; when a service is due, and when a contract is about to end.

On the Grid, next to the vehicle code, an exclamation mark will indicate that an action is needed, and when hovering on the exclamation mark, the action is listed as follows:



Reports can also be obtained which will indicate:

- ✓ Which vehicle licences have already expired, and which are still valid.
- ✓ Services due - and if overdue - how many kilometres the service is overdue.
- ✓ And contracts expiring within a selected date range.

In addition, 2 custom reminders can be set up for all Vehicles in the system.

Dates are linked to the custom reminders; the notification period set, and exclamation marks will appear next to the vehicle code on the grid to notify the User of an action to be taken.



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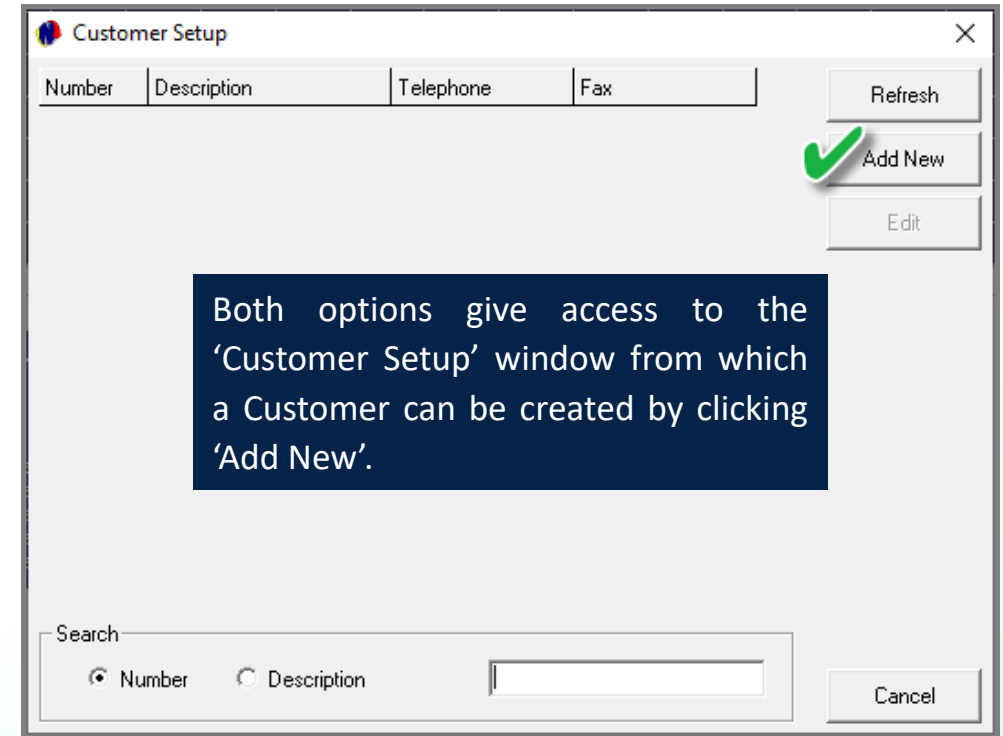
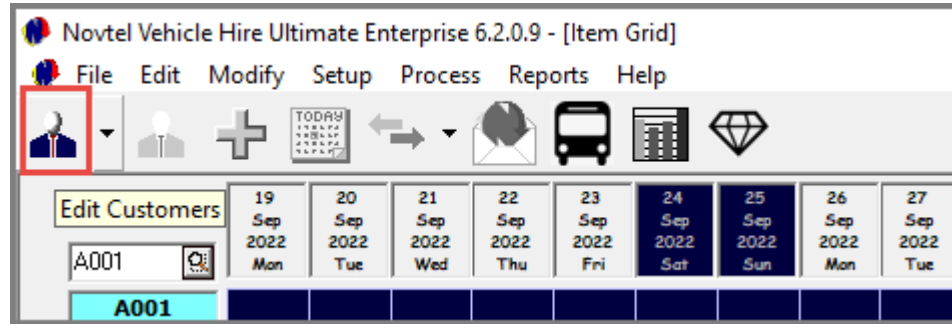
**Creating and
Managing Customers**



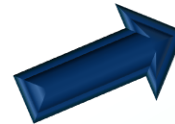
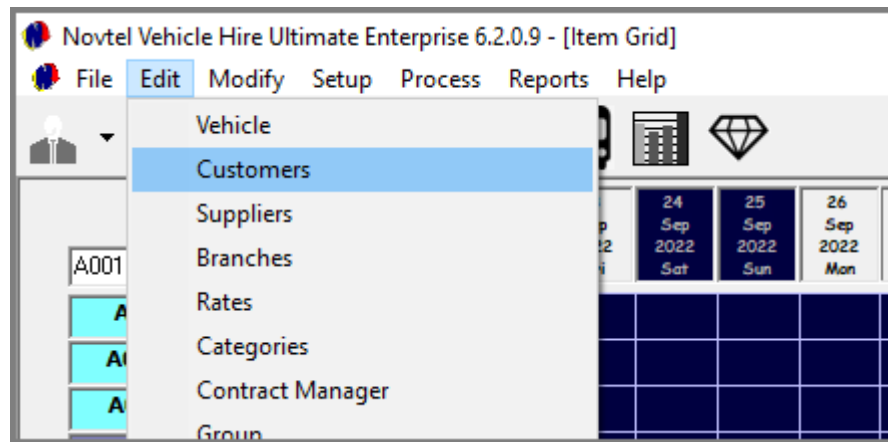


Customers

New Customers can be created, and existing ones accessed by clicking on the 'Edit Customer' icon.



Or: From the 'Edit' menu, select 'Customers'.





Customers

An unlimited number of Customers can be set up in Novtel and will also automatically be saved in the financial system simultaneously.

1. By using the 'Customer AutoNumber' functionality, the system User will only type the 3 letters 'Alpha-Code', and Novtel will check for and insert the next available numeric code.
2. Enter the Customer Description in this field.
3. Select the relevant Customer Category to be linked to this Customer.
4. And if 'Multi-Currency' is set up in the financial system, select the applicable currency here while in the process of creating the Customer Master File. Once saved, the currency CANNOT be changed.

Add New Customer

Account Code	AND001 1	<input checked="" type="checkbox"/> Use Customer AutoNumber	<input type="checkbox"/> Corporate Customer
Description	Anderson, Peter 2		<input type="checkbox"/> Monthly Customer
Customer Category	02 - Private Sector 3		<input type="checkbox"/> Inactive Customer
Pastel Foreign Currency	00 - Home Currency 4		



Customers

General

Delivery Addresses

User Defined Fields

Additional Contacts

Postal Address

PO Box 123

Belville

Cape Town

0100

Tax Reference

Telephone No

021 456123

Fax No

Mobile Phone

082 123654

Email Address

peter@anderson.com

Contract Month Start Day

1

Customer Notes

Accept

Cancel

In the 'General' tab, all contact details must be captured.

General

Delivery Addresses

User Defined Fields

Additional Contacts

Delivery Address

44 West Street

Belville

Cape Town

0100

Customer Notes

Accept

Cancel

Enter the Customer's physical address in the 2nd tab.



Customers

In the User Defined Fields tab, Novtel has made provision for additional information to be entered in 5 fields.

By default, the line descriptions are indicated as 'User Defined Field 1 – 5'. However, we have customised lines 1 – 3 in the User Defined Fields Setup screen as follows:



The 'User Defined Fields Setup' dialog box is shown with the 'Customers' tab selected. It contains five input fields for user-defined fields. The first three fields are pre-filled with custom descriptions: 'ID Number', 'Nationality', and 'Frequent Customer?'. The last two fields are empty and contain a period as a placeholder. The 'Accept' and 'Cancel' buttons are at the bottom right.

Field	Description
Customer User Defined Field 1	ID Number
Customer User Defined Field 2	Nationality
Customer User Defined Field 3	Frequent Customer?
Customer User Defined Field 4	.
Customer User Defined Field 5	.

Therefore, the customised descriptions are displayed on all Customer Master Files, and the relevant information can now be entered per line, and per Customer respectively.

The 'Customer Master File' form is shown with the 'User Defined Fields' tab selected. The first three fields are pre-filled with the custom descriptions: 'ID Number', 'Nationality', and 'Frequent Customer?'. The last two fields are empty and contain a period as a placeholder. The 'Accept' and 'Cancel' buttons are at the bottom right.

Field	Description
ID Number	740302010405
Nationality	South-African
Frequent Customer?	Yes
	.
	.



Customers

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help

Icons: User, Add, Today, Previous, Next, Vehicle, Calendar, Diamond

	21 Sep 2022 Wed	22 Sep 2022 Thu	23 Sep 2022 Fri	24 Sep 2022 Sat	25 Sep 2022 Sun	26 Sep 2022 Mon	27 Sep 2022 Tue	28 Sep 2022 Wed	29 Sep 2022 Thu	30 Sep 2022 Fri	01 Oct 2022 Sat	02 Oct 2022 Sun	03 Oct 2022 Mon	04 Oct 2022 Tue	05 Oct 2022 Wed
A001					31 Anderson, Peter										
A001A															
A001B															
A002															
A003															
A004															
A005															
B001															

View Vehicles by:
☒ Code
☐ Registration Number

Search, New Reservation, Date Range: 2022/09/21 to 2022/10/20, Tooltip Display: Customer Info

Reservation Number 31
AND001 Anderson, Peter
PO Box 123
Bellville
Cape Town
0100
peter@anderson.com

Mobile Phone 082 123654
Fax
Telephone 021 456123
ID Number 740302010405
Nationality South-African
Frequent Customer? Yes

When a reservation is made for the Customer, and the system User hovers on the reservation on the Grid, the Customer's contact details will be displayed below the Grid, as well as the captured User Defined Fields information.



Customers

The screenshot shows a software interface with four tabs: 'General', 'Delivery Addresses', 'User Defined Fields', and 'Additional Contacts'. The 'Additional Contacts' tab is active and highlighted with a red box. It contains a table with columns: 'Default', 'Lastname', 'Initials', 'Firstname', and 'Id Number'. To the right of the table are two buttons: 'Add' (with a green checkmark icon) and 'Remove'.

In the 'Additional Contacts' tab, the User will be able to add more contact persons to this Customer master file by clicking 'Add' here, and 'Add' again in the next screen.

The screenshot shows a 'Additional Contact List' window with a table containing columns 'Id/Passport No', 'Last Name', and 'First Name'. An 'Add' button is visible. A red arrow points from this button to an 'Add Contact' dialog box. The dialog box has a 'General' tab and contains the following fields: 'Last Name' (Anderson), 'First Name' (Sandra), 'ID Number' (78010203040506), 'Passport' (empty), 'Title' (Mrs), 'Initials' (S.A), 'Date of Birth' (1978/01/02), 'Gender' (F), 'Maiden Name' (Potgieter), 'Marital Status' (Married in community of property), 'Date Married' (2018/09/08), 'Cellphone Number' (081 010402), and 'Valid Drivers' (Yes). At the bottom of the dialog are 'Accept' and 'Cancel' buttons, with a green checkmark icon next to 'Accept'.

All relevant details must be captured for this contact before clicking 'Accept'.



Customers

Additional Contact List

Id/Passport No	Last Name	First Name
78010203040506	Anderson	Sandra

Buttons: Add, Edit, Delete

Search: Search By Search For

Buttons: Select, Cancel

The newly created contact can now be clicked and the 'Select' button selected to add this contact to the current Customer Master File – after which it will be displayed in the 'Additional Contacts' tab.

Please note that Customer Notes can also be captured per Customer Master File, but this can only be done after the Customer Master File was saved initially by clicking 'Accept'.

Add New Customer

Account Code: ☒ Use Customer AutoNumber

Description:

Customer Category:

Pastel Foreign Currency:

☐ Corporate Customer
☐ Monthly Customer
☐ Inactive Customer

General | Delivery Addresses | User Defined Fields | **Additional Contacts**

Default	Lastname	Initials	Firstname	Id Number
<input type="checkbox"/>	Anderson	S.A	Sandra	78010203040506
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Buttons: Add, Remove

Customer Notes

Buttons: Accept, Cancel



Customers

Number	Description	Telephone	Fax
AND001	Anderson, Peter	021 456123	

Buttons: Refresh, Add New, Edit

Search: ☒ Number ☐ Description

The newly created Customer Master File can now be selected and the 'Edit' button clicked to access it.

Clicking on the 'Customer Notes' button, a new note can be captured by clicking 'Add'.

Account Code: AND001
Description: Anderson, Peter
Customer Category: 02 - Private Sector
Pastel Foreign Currency: 00 - Home Currency

General tab selected. Postal Address: PO Box 123, Bellville, Cape Town, 0100. Tax Reference:

Buttons: Customer Notes, Add, Edit, Delete

The note is to be captured and saved.

Client Code: AND001 Date: 2022/09/19

Note: The Customer will ONLY rent automatic vehicles.

Buttons: Accept, Cancel



Customers

Setup Customer Note

Client Code	Note Date	User	Note
AND001	2022/09/19	Louise	The Customer will ONLY rent automatic vehicles.

◀ ▶

Add Edit Delete

Close

The note is now visible for any system User to access from the Customer’s Master File.

CUSTOMER LISTING					
Date and Time Report printed : 2022/09/19 10:13:39					
Code	Description	Telephone	Fax	Cell	Email
AND001	Anderson, Peter	021 456 123		082 123 654	peter@anderson.com
NOTES: The Customer will ONLY rent automatic vehicles.					

If selected in the ‘Setup Company – Preferences’ tab, the Notes entered per Customer, will be displayed on the ‘Customer Listing’ report.



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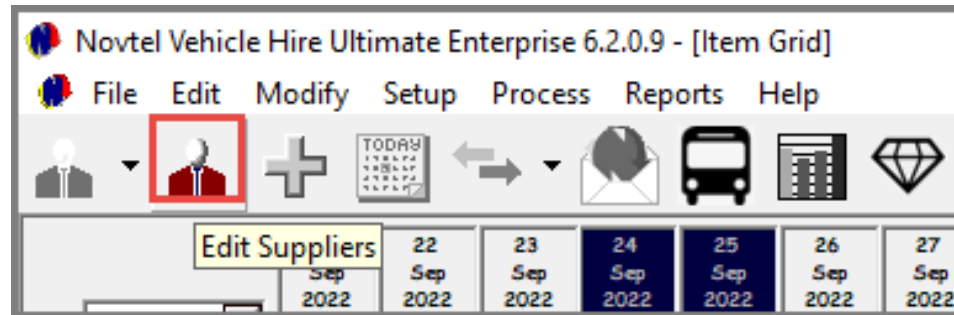
3

Suppliers;
Supplier Prices,
and Sub-Hires





Suppliers



Suppliers

Account Code: BES001

Description: Best Car Rental

Pastel Foreign Currency: 00 - Home Currency

General | Delivery Addresses | User Defined Fields

Postal Address: PO Box 456, Durbanville, Cape Town, 0100

Telephone No: 021 987456

Fax No:

Mobile Phone: 083 963258

Email Address: best@carrental.com

Save Cancel

Supplier Master Files

An unlimited number of Suppliers can be created in Novtel.

Any person or company rendering a service to your company can be classified as a Supplier. Examples may include the following:

- ✓ Plumbers
- ✓ Electricians
- ✓ Garden Services – if applicable
- ✓ As well as companies from which a vehicle can be sub-hired in the case where your fleet, or required vehicles are not available for the period requested.

Supplier Master Files requires a unique account code and description, and in the 'General' tab, all contact details are captured.



Suppliers

The screenshot shows the 'Suppliers' form with the 'Delivery Addresses' tab selected. The form contains the following fields:

- Account Code: BES001
- Description: Best Car Rental
- Pastel Foreign Currency: 00 - Home Currency

The 'Delivery Addresses' tab is highlighted with a red box. It contains a table with the following data:

Delivery Address
98 Best Street
Durbanville
Cape Town
0100

Buttons: Save, Cancel

In the 'Delivery Address' tab, the Supplier's physical address is entered, and in the 'User Defined Fields' tab, custom information is captured as required, and as set up by the system Administrator.

The screenshot shows the 'Suppliers' form with the 'User Defined Fields' tab selected. The form contains the following fields:

- Account Code: BES001
- Description: Best Car Rental
- Pastel Foreign Currency: 00 - Home Currency

The 'User Defined Fields' tab is highlighted with a red box. It contains the following fields:

Office Hours	7am - 6pm
Trading Days	Monday - Sunday
Type of Supplier	Sub-Rental
Contact Person	Riaan
24 Hour Contact Nr	082 258852

Buttons: Save, Cancel



Supplier Prices

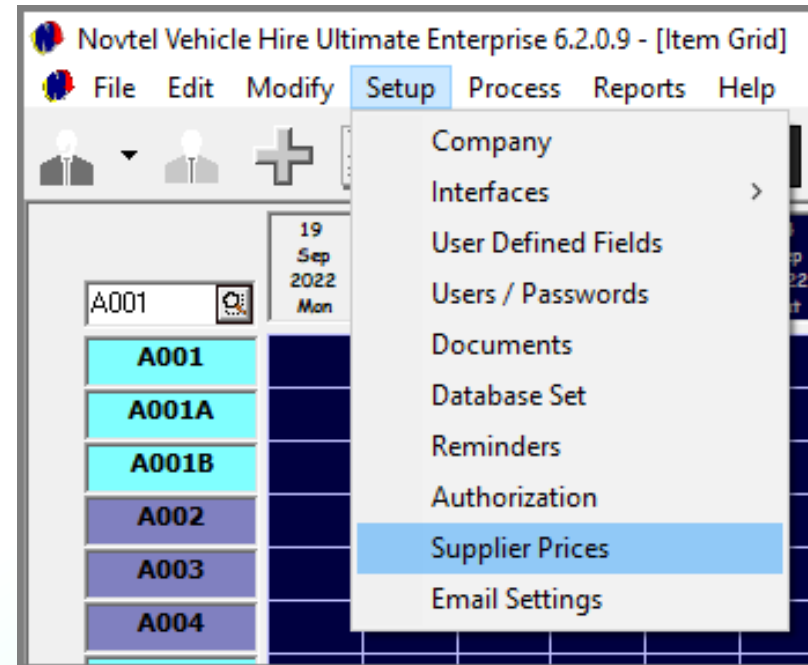
The 'Setup Supplier Prices' window shows the configuration for a supplier. The 'Supplier' field is set to 'BES001' and the 'Best Car Hire' company. The 'Category' is 'AS02'. The 'Cost per Day' is 210, 'Rate per Day' is 275.00, and 'Profit' is 65.00. A 'Details' table lists various categories with their respective costs, rates, and profits. The 'AS02' row is highlighted. Buttons for 'Cancel', 'Accept', 'Remove', 'Add', 'Exit', and 'Save' are visible.

Category	Cost	Rate	Profit
A	350.00	500.00	150.00
B	400.00	550.00	150.00
C	500.00	700.00	200.00
D	600.00	850.00	250.00
BS30	195.00	255.00	60.00
AS02	210.00	275.00	65.00

Setting up Supplier Prices

Supplier prices for sub-rented vehicles can be imported from an Excel spreadsheet, or it can be set up manually directly in Novtel.

It can be accessed; viewed; edited or deleted from the 'Setup – Supplier Prices' menu option – if activated in the Setup – Company' menu.





Sub-Hire Reservations

The screenshot shows a calendar interface with dates from 29 Sep to 16 Oct 2022. A red arrow points from the date 01 Oct to the reservation details window. The window is titled 'Reservation Details' and has tabs for General, Financial, Additional Costs, Additional Drivers, and Quick View. The General tab is active, showing fields for Vehicle Number (A001), Reservation Number (32), Order Number, Customer Code (AND001), Description (Anderson, Peter), and Comments. A red box highlights the Category field (A1 - 1-7 Days) and the Date Out (2022/09/30) and Time Out (08:00:00) fields.

Sub-Hire Reservations

In our example, we have created a reservation for a vehicle classified as a 'Sub-hire Item'.

The Category – A1 – 1-7 Days – has been linked to the reservation.

The screenshot shows the 'Financial' tab of the 'Reservation Details' window. It displays various financial fields including Price (Incl), Price (Excl), Tax, Invoice Total, Deposit Calculated By (Percentage/Amount), Deposit Amount, Rental Charge Per Day (Incl/Excl), Applicable Rates Incl Tax (Insurance Charge Per Day, Contract Fee), and Subhire Details (SH Number, Supplier). A red arrow points from the 'SH Number' field in the Subhire Details section to the 'SH Number' field in the 'General' tab of the previous screenshot.

Proceeding to the 'Financial' tab, the search option is selected in the 'SH Number' field.



Sub-Hire Reservations

Select Best Price

BES001	GRE001	PRE001
Cost per Day 250.00	Cost per Day 275.00	Cost per Day 310.00
Rate per Day 300.00	Rate per Day 300.00	Rate per Day 300.00
Profit per Day 50.00	Profit per Day 25.00	Profit per Day -10.00

This will display the 'Select Best Price' screen, indicating the 3 best prices in sequence from the lowest to the highest, and the preferred price can now be selected and confirmed.

Novtel Vehicle Hire

Are you sure that the selected supplier is correct?

Subhire Vehicle

Subhire Number : New Reservation : 32

Date Start : 30 September 2022 Vehicle to be subhired : Datsun Go

Date End : 03 October 2022 Customer : AND001 Anderson, Peter

Supplier BES001 1 Best Car Rental

Financial Additional Costs Quick View

Contact Person

Registration Number

Supplier Reservation Number

Order Number

Supplier Invoice Number

Remarks

Duration Charged 3 Price Lists

Buy Price Per Day		Selling Price Per Day	
Price (Excl)	217.39	Price (Excl)	260.87
Tax	32.61	Tax	39.13
Price (Incl) 2	250.00	Price (Incl)	300.00

Nett Profit/Loss

Customer Invoice Excl Total	782.61		
Supplier Invoice Excl Total 3	652.17	Gross Excl Profit	130.44

1. The selected Supplier is now displayed at the top of the 'Sub-Hire Vehicle' screen.
2. The buying price per day is indicated here.
3. And the amount – exclusive of VAT – owed to the supplier, is indicated at the bottom of the screen.

4

Rates (Charges)





Rates (Charges)

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help

Vehicle
Customers
Suppliers
Branches
Rates
Categories
Contract Manager
Group

Rate Setup

Code	Description	Amount
AD001	Additional Driver	100.00
C001	Car Seat	20.00
EXC001	Excess Kilometers	10.00
R001	Roof Rack	20.00

Sort By: Code Search:

Code: Description: Rates:

Add New Edit Delete Close

Any charge to be added to the reservation or contract, can be created in the 'Edit – Rates' menu.

Such charges may include the following:

- ✓ A Contract Charge
- ✓ Excess Km / Miles per vehicle grouping
- ✓ Basic Insurance per vehicle grouping
- ✓ Additional Insurance per vehicle grouping
- ✓ Super Insurance per vehicle grouping
- ✓ Car Seat Rental
- ✓ Roof Rack
- ✓ Pick-up / drop-off fees
- ✓ Additional Driver
- ✓ Young Driver, etc



Rates (Charges)

Add New Rate

Code: 1

Description: 3

☒ 2 Create Item In Pastel

☒ 3 Display On Invoice

☐ Blocked

☐ Workshop Item

General

Rate Incl: 4

Rate Excl: 5

☒ Allow Tax

User Defined Field 1:

User Defined Field 2:

User Defined Field 3:

User Defined Field 4:

User Defined Field 5:

Pastel Inventory Code:

☒ Accept

1. A unique code and description must be created for each charge individually.
2. If the item does not yet exist in the financial system, the option is selected to 'Create Item in Pastel'. This will cause the item to be imported to Pastel once the charge is saved in Novtel.
3. To display the charge on the Customer's invoice, tick this checkbox.
4. Enter the amount inclusive of VAT to be charged.
5. And if VAT is applicable, tick the option to 'Allow Tax'. Novtel will then automatically calculate and insert the tax amount in the activated field.

To save the charge, click 'Accept'.

Import Inventory Item

Code:

Description:

Inventory Group:

Excl Selling Price:

☐ Physical Item

☒ Service Item

In this case the User will only classify the item to be imported to the financial system as a 'Service Item' and select the relevant Inventory Group before clicking 'Accept'.



Rates (Charges)

Rate Setup

Code	Description	Amount
AD001	Additional Driver	100.00
C001	Car Seat	20.00
EXC001	Excess Kilometers	10.00
INS001	Basic Insurance Group A Vehicles	600.00
R001	Roof Rack	20.00

Sort By: Code Search:

Code:

Description:

Rates:

The charge will now be created and when accessed, the Pastel Inventory Code it is linked to, is displayed at the bottom of the screen.

Edit Rate

Code:

Description:

☒ Display On Invoice
☐ Blocked
☐ Workshop Item

General

Rate Incl: Rate Excl: Allow Tax: ☒

User Defined Field 1:
User Defined Field 2:
User Defined Field 3:
User Defined Field 4:
User Defined Field 5:

Pastel Inventory Code:



Rates (Charges)

Add New Rate

Code: BRE001
Description: Break Pads - Datsun Go 2015 Model

☒ Create Item In Pastel
☒ Display On Invoice
☐ Blocked
☒ Workshop Item

General

Rate Incl: 350.00 Rate Excl: 304.35 Allow Tax: ☒

User Defined Field 1:
User Defined Field 2:
User Defined Field 3:
User Defined Field 4:
User Defined Field 5:

Pastel Inventory Code:

Accept Cancel

Other charges to be created, include:

- ✓ Damaged parts of a vehicle such as a Right Fender; Left Taillight; Bonnet; Front Left Indicator Light, etc.
- ✓ Items needed to service a vehicle, such as Spark Plugs; Fan Belt; Brake Pads, etc.

Should the Workshop Module be used in Novtel to record, track and repair damages or perform services on vehicles, these charges will be classified as 'Workshop Items' to make it available for selection in the Workshop Module.

List Rates			
PRINTED DATE: 20 September 2022 TIME: 07:33:08			
CODE	DESCRIPTION	RATE	ALLOW TAX
AD001	Additional Driver	100.00	YES
BRE001	Break Pads - Datsun Go 2015 Model	350.00	YES
C001	Car Seat	20.00	YES
EXC001	Excess Kilometers	10.00	YES
INS001	Basic Insurance Group A Vehicles	600.00	YES
R001	Roof Rack	20.00	YES
NUMBER OF RATES: 6			

A complete list of all charges in the Novtel System can be obtained by clicking on the -Reports – List – Rates' menu option.

5

Categories





Categories

The screenshot shows the 'Edit Category' dialog box in the Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid] application. The dialog box is titled 'Edit Category' and has a close button (X) in the top right corner. It contains the following fields and sections:

- Name:** A1
- Description:** 1-7 Days
- Detailed Notes:** A large text area for notes.
- Applicable Rates Incl Tax:** A section with a table of rates.
- Buttons:** 'Accept' and 'Cancel' buttons at the bottom.

The 'Applicable Rates Incl Tax' section contains the following data:

	Premium	Amount
Rental Charge Per Day		300.00
Insurance Charge Per Day		40.00
Contract Fee		60.00
Free KM		300.00
Standard Insurance	0.00	0.00
Super Cover Insurance	0.00	0.00

Categories must be planned well before creating it in Novtel.

Vehicles are not all charged at the same rates, and therefore we need to create price structures for each group individually.

Rates may also vary for the rental of a vehicle for different rental periods.

On the Category Master File, you will be able to capture the following information:

- ✓ The Category Code and Description
- ✓ Detailed Notes pertaining to the Category
- ✓ The rental charge per day
- ✓ The Insurance amount per day (Which will not automatically be charged when a vehicle is rented, but it is an indication of the price to be charged)
- ✓ The Contract Fee (Which will not automatically be charged when a vehicle is rented, but it is an indication of the price to be charged)
- ✓ And the number of free kilometres allowed before the Customer will be charged for the excess kilometres upon returning the vehicle.
- ✓ Standard and Super Cover Insurance amounts.



Categories

The following may be an example of how to set up the Categories, but please note that it is an indication ONLY.

GROUP A VEHICLES

Code	Rental Period	Rental/ Day	Insurance / day	Contract Fee	Free KM
A1	1 – 7 Days	300.00	40.00	60.00	300
A2	8 – 14 Days	290.00	35.00	60.00	450
A3	15 – 21 Days	280.00	30.00	60.00	600
A4	22 – 28 Days	270.00	25.00	60.00	750

GROUP B VEHICLES

Code	Rental Period	Rental/ Day	Insurance / Day	Contract Fee	Free KM
B1	1 – 7 Days	450.00	80.00	60.00	500
B2	8 – 14 Days	440.00	70.00	60.00	650
B3	15 – 21 Days	430.00	60.00	60.00	800
B4	22 – 28 Days	420.00	50.00	60.00	1000

GROUP C VEHICLES

Code	Rental Period	Rental/ Day	Insurance / Day	Contract Fee	Free KM
C1	1 – 7 Days	500.00	120.00	60.00	700
C2	8 – 14 Days	590.00	110.00	60.00	900
C3	15 – 21 Days	580.00	100.00	60.00	1200
C4	22 – 28 Days	570.00	90.00	60.00	1500



Categories

When created, the 'Category Setup' window will be displayed as follows:

Category Setup

A Group A

A1 1-7 Days

A2 8-14 Days

A3 15-21 Days

A4 22-28 Days

ADD Additional Trips

B Group B

B1 1-7 Days

B2 8-14 Days

B3 15-21 Days

B4 22-28 Days

C Group C

C1 1-7 Days

C2 8-14 Days

C3 15-21 Days

C4 22-28 Days

MULTI Multitrips

Name

A1

Description

1-7 Days

Detailed Notes

Add New

Edit

Delete

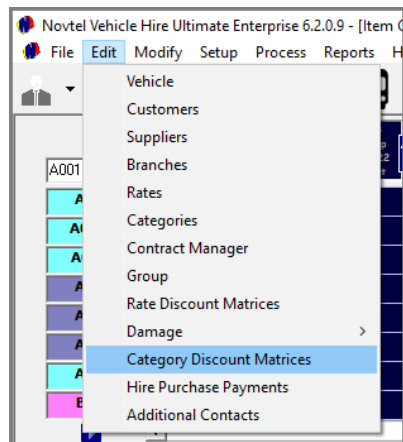
Close

The 'List Categories' report will display all created Categories, and the details linked to it.

List Categories						
PRINTED DATE: 20 September 2022 TIME: 07:54:13 AM						
CODE	DESCRIPTION	DETAILED NOTES	RENTAL CHARGE PER DAY	INSURANCE CHARGE PER DAY	CONTRACT FEE	FREE KM
A	Group A		0.00	0.00	0.00	0
A1	1-7 Days		300.00	40.00	60.00	300
A2	8-14 Days		290.00	35.00	60.00	450
A3	15-21 Days		280.00	30.00	60.00	600
A4	22-28 Days		270.00	25.00	60.00	750
ADD	Additional Trips		100.00	0.00	0.00	0
B	Group B		0.00	0.00	0.00	0
B1	1-7 Days		450.00	80.00	60.00	500
B2	8-14 Days		440.00	70.00	60.00	650
B3	15-21 Days		430.00	60.00	60.00	800
B4	22-28 Days		420.00	50.00	60.00	1000
C	Group C		0.00	0.00	0.00	0
C1	1-7 Days		500.00	120.00	60.00	700
C2	8-14 Days		590.00	110.00	60.00	900
C3	15-21 Days		580.00	100.00	60.00	1200
C4	22-28 Days		570.00	90.00	60.00	1500
MULTI	Multitrips		250.00	0.00	0.00	20
NUMBER OF CATEGORIES :			17			



Categories



Discount per Category

It is possible to create discount structures for specific Vehicle Categories, and for a specific Customer.

For example: We have selected Stanton Travels here and added the 'Camper Vans' Category – which is normally charged at R400.00 per day.

Category Code	Description	Excl	Tax	Incl	Disc%
CAMPER	Camper Vans	347.83	52.17	400.00	0

Entering the discount percentage of 10% in the 'Discount' column, the normal price is reduced to R360.00.

Category Code	Description	Excl	Tax	Incl	Disc%
CAMPER	Camper Vans	313.04	46.96	360.00	10



Categories

Reservation Details

General Financial Additional Costs Additional Drivers Quick View

Vehicle Number CAM001 Camper Van Duration Charged 4

Reservation Number New Reser RA Number Category CAMPER - Camper Var Clear

Order Number

Customer Code STA001 Search <F5>

Description Stanton Travels

Comments

Delivery Address

Pickup Address

KM Out 0
KM In 0
KM Used 0
KM Free 1200
KM Charged 0
Fuel Used 0

Date Out 2022/09/20
Time Out 08:00:00

Date In 2022/09/24
Time In 08:00:00

Estimated Time Due 08:00:00

Payment Type

Remarks

Status Provisional

Accept Cancel

Whenever a reservation is created for this Customer, and the 'Camper Vans' Category is linked to a reservation, the discounted daily price will be charged instead of the normal price as inserted on the Category itself.

Reservation Details

General Financial Additional Costs Additional Drivers Quick View

Price (Incl) 1440.00 ✓

Price (Excl) 1252.17

Tax 187.83

Invoice Total 1440.00

Duration Charged 4

Deposit Calculated By
☐ Percentage ☒ Amount

Deposit Amount 0.00

Date Raised 2022/09/20

☐ Deposit Paid

☐ Deposit Applied

Rental Charge Incl / Excl

Rental Charge Per Day (Incl) 360.00 ✓

Rental Charge Per Day (Excl) 313.04

Agent Code

Description

Applicable Rates Incl Tax

	Premium	Amount
Insurance Charge Per Day		100.00
Contract Fee		50.00
Standard Insurance	0.00	200.00
Super Cover Insurance	0.00	520.00

Accept Cancel

6

Vehicles





Vehicles

New Vehicles can be created continually as and when it is added to your fleet.

When a vehicle is sold, it will be classified as 'Disposed', and will no longer be available for rental.

BUT: Vehicles can never be deleted from the system because of a history linked to it.

Vehicle Codes must be planned well, and this is an indication of how it can be set up:

GROUP A TYPE VEHICLES

Vehicle Code	Vehicle Description
A001	Datsun Go
A002	Chev Spark
A003	Fiat Palio
A004	Opel Corsa Lite
A005	Toyota Tazz

GROUP B TYPE VEHICLES

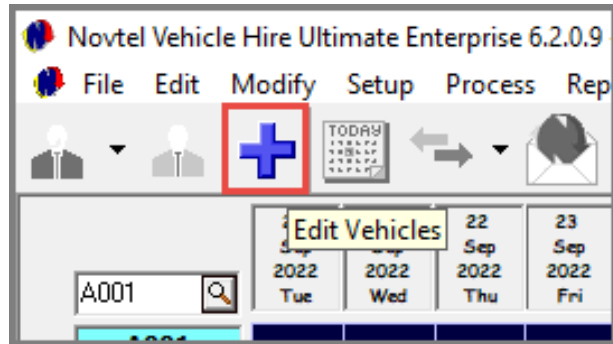
Vehicle Code	Vehicle Description
B001	Volkswagen Polo Sedan (M)
B002	Volkswagen Polo Sedan (A)
B003	Hyundai Accent
B004	Chev Aveo Sedan
B005	Opel Corsa Sedan

GROUP C TYPE VEHICLES

Vehicle Code	Vehicle Description
C001	Toyota Fortuner
C002	Nissan Qashqai
C003	Ford Ranger 4x4 Double Cab
C004	Volkswagen Tiguan
C005	Mazda CX-3



Vehicles



When a new vehicle is created, and it has not yet been created in the financial system, the checkbox is ticked to 'Create Item in Pastel'. When the vehicle is saved, it will be imported to Pastel automatically.

The Vehicle Master File is displayed as follows, and the details for each vehicle must be entered and selected correctly:

The General Tab:

Add New Vehicle

Code: B002
Description: Volkswagen Polo Sedan (A) ☒ Create Vehicle In Pastel

General | Details | Financial | User Defined Fields | Pastel Interface | Assets

Branch: ☐ Cape Town, South Africa
Registration Number: CA412
Manufacturer: Volkswagen
Category: B - Group B
Type: Car/Automobile
PAX Vehicle: ☐

Show On Grid: ☒
Subhire Item: ☐
Hire Purchase: ☐
Monthly Billed Item: ☐
Maintenance Item: ☒
Additional Daily Hire Item: ☐
Disposed: ☐

Accept Cancel

The Details Tab:

Add New Vehicle

Code: B002
Description: Volkswagen Polo Sedan (A) ☒ Create Vehicle In Pastel

General | **Details** | Financial | User Defined Fields | Pastel Interface | Assets

General Details

Tyres Make: Dunlop
Spare Tyre Make: Dunlop
Battery Make: Willard
License Due: 2023/09/20

Recurring Maintenance

Current KM: 10235
First Maintenance: 15000 km
Recurring Interval: 15000 km
Next Maintenance: 15000 km

Maintenance

Under Maintenance Plan: ☐ Yes ☒ No
KM's Covered: 100000
Expiry Date: 2019/07/10

Accept Cancel



Vehicles

Add New Vehicle

Code: B002
Description: Volkswagen Polo Sedan (A) ☒ Create Vehicle In Pastel

Financial | General | Details | User Defined Fields | Pastel Interface | Assets

Cost Price: 369000.00
Rental Per Day Excl Tax: 391.30
Tax: 58.70
Rental Per Day Incl Tax: 450.00

Default Charges:
Insurance Charge:
Contract Charge:
Excess KM Charge:

Date Of Purchase: 2021/09/20 Replacement Value: 352000.00
Supplier Code:
Monthly Payment: 0.00 Only available for Hire Purchased Items

The Financial Tab:

Please note that if specific charges are linked to the Vehicle Master File in this tab, it will be added to the contract or reservation automatically.

Add New Vehicle

Code: B002
Description: Volkswagen Polo Sedan (A) ☒ Create Vehicle In Pastel

General | Details | Financial | **User Defined Fields** | Pastel Interface | Assets

Vin No: 321456987
Engin No: 123456987
Model and colour: 2021 White
Stock Number: B2
Previous Registration No: New Car

Vehicle User Defined Reminder 1: 2022/09/20
Vehicle User Defined Reminder 2: 2022/09/20

The User Defined Fields Tab:

Here, 5 fields are available to capture custom information.

By default, the line descriptions are indicated as 'User Defined Field 1- 5'. However: If custom User Defined Fields for all Vehicles have been created from the 'Setup – User Defined Fields – Vehicles' window, the line descriptions for all vehicles will be exactly the same.

In this case, we have set up Custom descriptions and entered the corresponding information per line for this vehicle.



Vehicles

Add New Vehicle

Code: B002
Description: Volkswagen Polo Sedan (A) ☒ Create Vehicle In Pastel

General | Details | Financial | User Defined Fields | **Pastel Interface** | Assets

Pastel Inventory Code:
Pastel Cost Code:

☒ Accept

Import Inventory Item

Code: B002
Description: Volkswagen Polo Sedan (A)
Inventory Group: 001 - Services
Excl Selling Price: 391.30

☐ Physical Item
☒ **Service Item**

☐ Create Cost Code

The Pastel Interface Tab

This tab will be void of information as the vehicle was not yet imported to Pastel. By saving the Vehicle Master File, the import will take place.

Returning to the Vehicle Master File, the Pastel Inventory Code is displayed here:

Edit Vehicle

Code: B002
Description: Volkswagen Polo Sedan (A)

General | Details | Financial | User Defined Fields | **Pastel Interface** | Assets

Pastel Inventory Code: B002 Volkswagen Polo Sedan (A)
Pastel Cost Code:



Vehicles

The Assets Tab

The screenshot shows the 'Edit Vehicle' window with the 'Assets' tab selected. The window has a title bar with a close button. Below the title bar, there are two text fields: 'Code' with the value 'B002' and 'Description' with the value 'Volkswagen Polo Sedan (A)'. Below these fields are six tabs: 'General', 'Details', 'Financial', 'User Defined Fields', 'Pastel Interface', and 'Assets'. The 'Assets' tab is highlighted with a red border. Below the tabs is a table with the following columns: 'AssetType', 'Manufacture', 'SerialNumbe', 'Model', 'Supplier', 'PurchaseDe', 'WarrantyPer', 'WarrantyExp', and 'Replacem'. The table is currently empty. Below the table is a 'Print List' button. At the bottom of the window are 'Accept' and 'Cancel' buttons.

AssetType	Manufacture	SerialNumbe	Model	Supplier	PurchaseDe	WarrantyPer	WarrantyExp	Replacem
-----------	-------------	-------------	-------	----------	------------	-------------	-------------	----------

The 'Assets' module is used to manage and keep track of items linked to a vehicle, such as a car radio; roof rack, or any other item you wish to track.

The Item's Serial Number; Model Number; Manufacturer; Supplier Details and the purchase date can be entered on the Asset Master File to effectively keep track the warranty period.

This vehicle's 'Assets' are set up in the 'Assets' module and will then be displayed in this tab afterwards.

7

Contracts and Recurring Billing

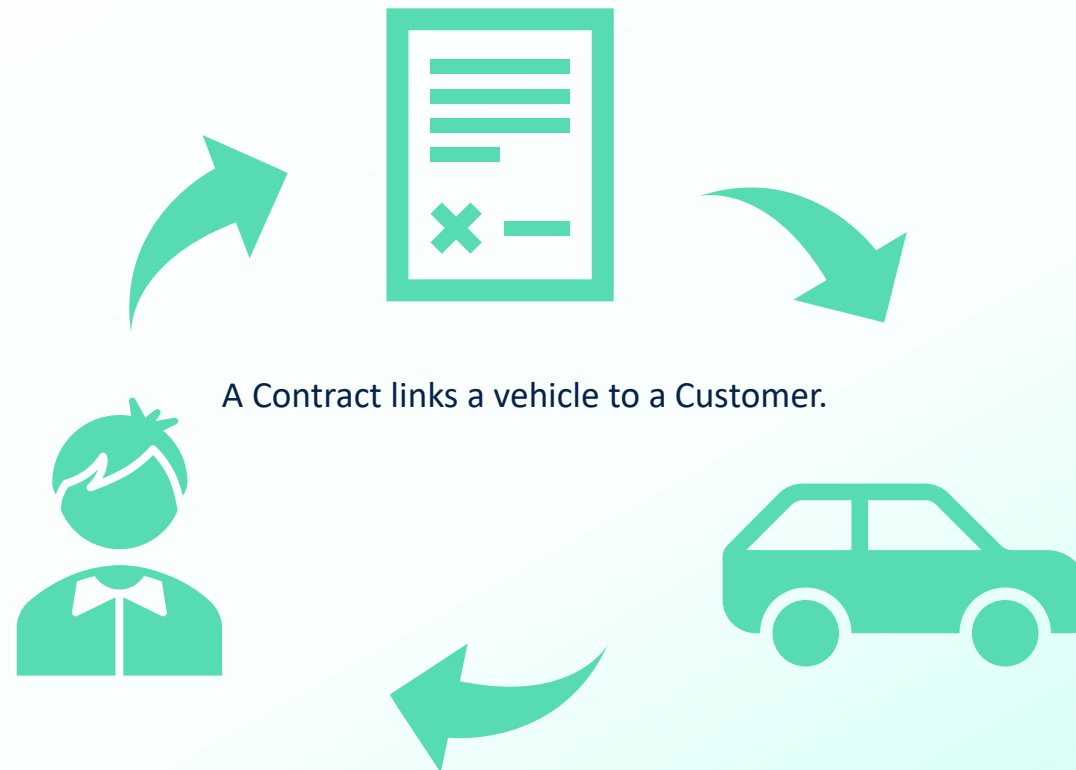




Contracts

In Novtel Vehicle Hire, the following types of contracts can be created by using the 'Contract Manager' option:

- ✓ Fixed Monthly Contracts
- ✓ Month-to-Month Contracts
- ✓ Fixed Weekly Contracts
- ✓ Week-to-Week Contracts





Contracts

Contract Manager

Contract Number6TypeFixed MonthlyCancel Contract

CustomerAND001Anderson, Peter

Date Start1 September 2022

Date End28 February 2023

6Months

VehiclesSubhiresFixed RatesSH Fixed Rates

Line	Type	Rate	Description	Qty	Excl	Tax	Incl
		0.00		0.00		0.00	

Add Rates To Vehicles

Add Remark

Add

Delete

Save

Cancel

In the ‘Fixed Rates’ tab of all contracts, specific charges can be added to be charged for the duration of the contract. The Customer will be liable for the payment of these charges, as it will be added to their Invoice.

Clicking ‘Add’, the window containing all pre-created charges in the system, will be displayed, and the applicable charges can be selected and added individually.

Select Rate

Search

Search ByCode

Search For

Code	Description	Excl	Tax	Incl
AD001	Additional Driver	86.96	13.04	100.00
BRE001	Break Pads - Datsun Go 2015 Model	304.35	45.65	350.00
C001	Car Seat	17.39	2.61	20.00
EXC001	Excess Kilometers	8.70	1.30	10.00
INS001	Basic Insurance Group A Vehicles	521.74	78.26	600.00
INS002	Insurance - Monthly	1043.48	156.52	1200.00
R001	Roof Rack	17.39	2.61	20.00

Accept

Cancel



Contracts

Contract Manager

Contract Number6TypeFixed MonthlyCancel Contract

CustomerAND001Anderson, Peter

Date Start1 September 2022Date End28 February 20236Months

VehiclesSubhiresFixed RatesSH Fixed Rates

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	INS002	Insurance - Monthly	1	1043.48	156.52	1200.00

1043.48156.521200.00

Add Rates To VehiclesAdd RemarkAddDelete

SaveCancel

By selecting the 'Add Rates to Vehicle' option, the charge will be added to every reservation linked to the contract.

The 'Invoice Total' amount will now also be amended for all reservations accordingly.

Contract Manager

Contract Number6TypeFixed MonthlyCancel Contract

CustomerAND001Anderson, Peter

Date Start1 September 2022Date End28 February 20236Months

VehiclesSubhiresFixed RatesSH Fixed Rates

B002 - Volkswagen Polo Sedan (A)

Add VehicleRemove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
34	2022/09/01	2022/09/30	Provisional	5100.00
35	2022/10/01	2022/10/31	Provisional	5100.00
36	2022/11/01	2022/11/30	Provisional	5100.00
37	2022/12/01	2022/12/31	Provisional	5100.00
38	2023/01/01	2023/01/31	Provisional	5100.00
39	2023/02/01	2023/02/28	Provisional	5100.00

Calculate Commission0Apply Commission

View ReservationEscalations

SaveCancel



Fixed Monthly Contracts

Fixed Monthly Contracts can be created with a definite start and end date.

A Global Contract Number is created by Novtel automatically, and for each of the contract months, a reservation exists.

Individual reservation numbers enable the system user to manage each reservation separately and bill specific charges to the reservation as, and when needed.

In this case, we have created a 6-month contract, starting on the 1st of September 2022, and ends on 28 February 2023.

Contract Manager

Contract Number: 6 Type: Fixed Monthly Cancel Contract

Customer: AND001 Anderson, Peter

Date Start: 1 September 2022 Date End: 28 February 2023 6 Months

Vehicles Subhires Fixed Rates SH Fixed Rates

B002 - Volkswagen Polo Sedan (A)

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
34	2022/09/01	2022/09/30	Provisional	5100.00
35	2022/10/01	2022/10/31	Provisional	5100.00
36	2022/11/01	2022/11/30	Provisional	5100.00
37	2022/12/01	2022/12/31	Provisional	5100.00
38	2023/01/01	2023/01/31	Provisional	5100.00
39	2023/02/01	2023/02/28	Provisional	5100.00

Calculate Commission 0 Apply Commission View Reservation Escalations

Save Cancel





Fixed Monthly Contracts

On the Grid, all reservations linked to the created contract, will be displayed.

Hovering on any of the reservations for the selected vehicle, the reservation number, as well as the client's contact details, and User Defined info are displayed below the grid.

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help

01 Sep 2021 02 Sep 2021 03 Sep 2021 04 Sep 2021 05 Sep 2021 06 Sep 2021 07 Sep 2021 08 Sep 2021 09 Sep 2021 10 Sep 2021 11 Sep 2021 12 Sep 2021 13 Sep 2021 14 Sep 2021 15 Sep 2021 16 Sep 2021 17 Sep 2021 18 Sep 2021 19 Sep 2021 20 Sep 2021 21 Sep 2021 22 Sep 2021 23 Sep 2021 24 Sep 2021 25 Sep 2021 26 Sep 2021 27 Sep 2021 28 Sep 2021 29 Sep 2021 30 Sep 2021 01 Oct 2021 02 Oct 2021 03 Oct 2021 04 Oct 2021 05 Oct 2021 06 Oct 2021 07 Oct 2021 08 Oct 2021 09 Oct 2021 10 Oct 2021 11 Oct 2021 12 Oct 2021 13 Oct 2021 14 Oct 2021 15 Oct 2021 16 Oct 2021 17 Oct 2021 18 Oct 2021 19 Oct 2021 20 Oct 2021 21 Oct 2021 22 Oct 2021 23 Oct 2021 24 Oct 2021 25 Oct 2021 26 Oct 2021 27 Oct 2021 28 Oct 2021 29 Oct 2021 30 Oct 2021

A001

A001A

A001B

A002

A003

A004

A005

B001

B002

CAM001

Anderson, Peter
Status : Provisional

34 Anderson, Peter

35 Anderson, Peter

33 Stanton

View Vehicles by
Code
Registration Number

New Reservation

2022/09/01 2022/10/31

Tooltip Display Customer Info

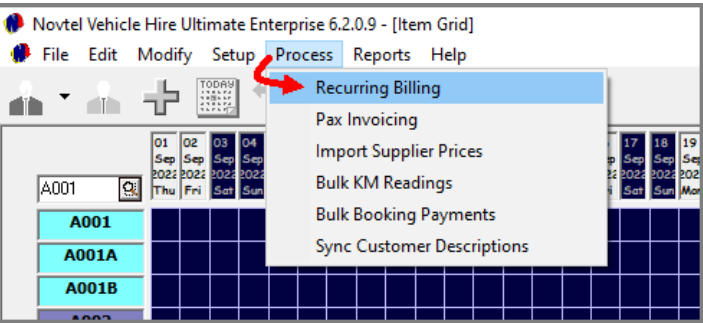
Reservation Number 34
AND001 Anderson, Peter
PO Box 123
Bellville
Cape Town
0100
peter@anderson.com

Mobile Phone 082 123654
Fax
Telephone 021 456123
ID Number 740302010405
Nationality South-African
Frequent Customer? Yes

Cancelled
Provisional
Confirmed
On Rent
Termed
Non Rev
Non Rev Return
Paid
Pax Container
Replaced

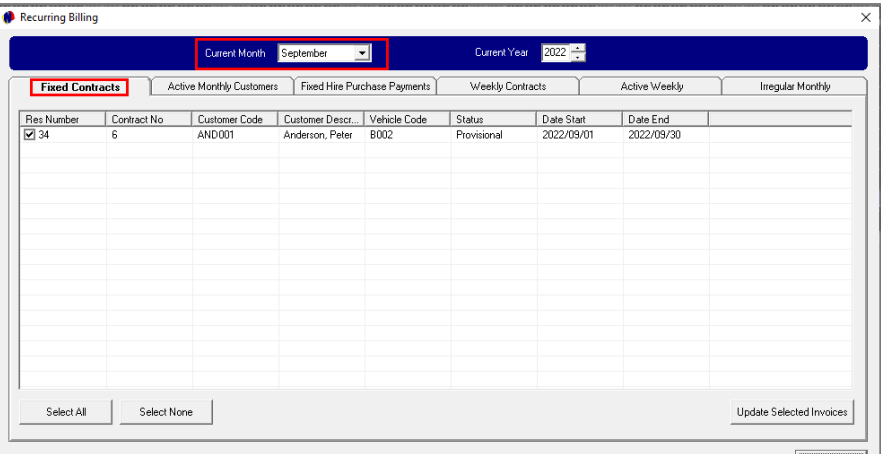


Billing Fixed Monthly Contracts

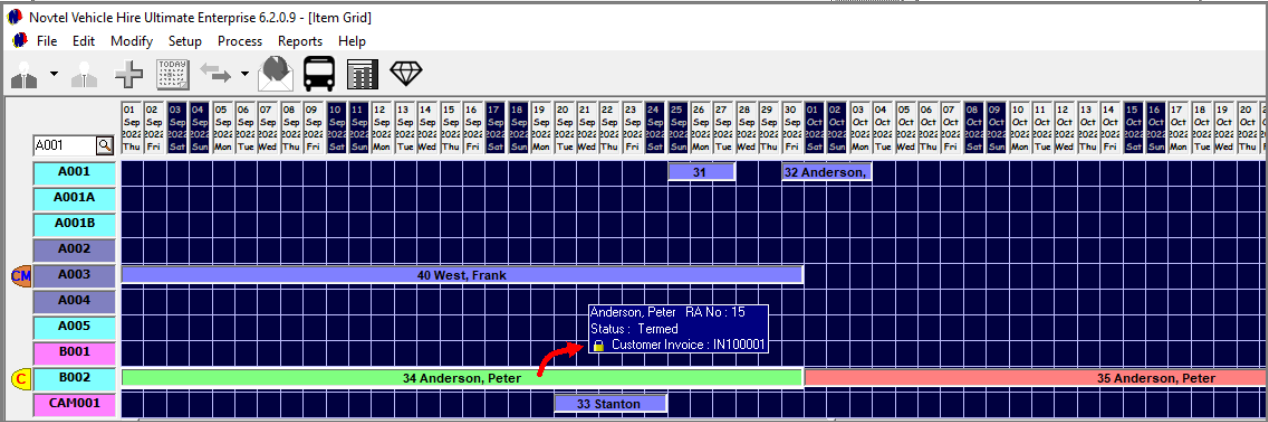
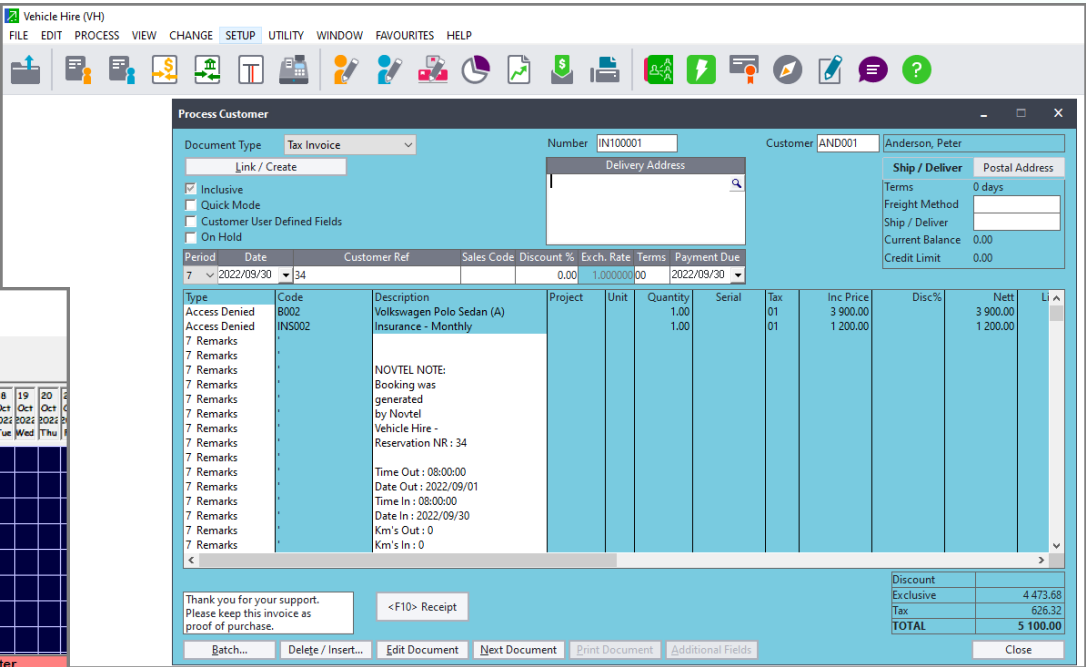


All contract Types are billed by means of the ‘Recurring Billing’ Feature.

All reservations linked to a fixed contract during the selected billing month, will be displayed in the ‘Fixed Contracts’ tab.



All reservations in this tab can be billed simultaneously – if so selected - and once invoiced in Novtel, the invoices will be created in the Financial system too.





Month-To-Month Contracts

Contract Manager

Contract Number: 7 Type: **Month-To-Month** Cancel Contract

Customer: WES001 West, Frank

Date Start: 1 September 2022 Contract Completed: ☐ 1 Months

Vehicles Subhires Fixed Rates SH Fixed Rates

A003 - Fiat Palio

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
40	2022/09/01	2022/09/30	Provisional	3500.00

Calculate Commission: 0 Apply Commission View Reservation Escalations









Save Cancel

When the Contract Type is selected as 'Month-to-Month', only 1 reservation is created.

The contract can either be continued for another month or terminated when the recurring billing process is performed.

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help



	01 Sep 2022	02 Sep 2022	03 Sep 2022	04 Sep 2022	05 Sep 2022	06 Sep 2022	07 Sep 2022	08 Sep 2022	09 Sep 2022	10 Sep 2022	11 Sep 2022	12 Sep 2022	13 Sep 2022	14 Sep 2022	15 Sep 2022	16 Sep 2022	17 Sep 2022	18 Sep 2022	19 Sep 2022	20 Sep 2022	21 Sep 2022	22 Sep 2022	23 Sep 2022	24 Sep 2022	25 Sep 2022	26 Sep 2022	27 Sep 2022	28 Sep 2022	29 Sep 2022	30 Sep 2022	01 Oct 2022	02 Oct 2022	03 Oct 2022	04 Oct 2022
	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue
A001																																		
A001A																																		
A001B																																		
A002																																		
A003																																		
A004																																		
A005																																		

CM

A001

A001A

A001B

A002

A003

A004

A005

40 West, Frank

31

32 Anderson,



Billing Month-To-Month Contracts (Continue Rental)

Recurring Billing

Current Month: September Current Year: 2022

Fixed Contracts **Active Monthly Customers** Fixed Hire Purchase Payments Weekly Contracts Active Weekly Irregular Monthly

Res Number	Customer Code	Customer Description	Vehicle Code	Status	Date Start	Date End
<input checked="" type="checkbox"/> 40	WES001	West, Frank	A003	Provisional	2022/09/01	2022/09/30

Month End Options

Update Customer And Supplier Invoices

☒ **Continue Reservation**
All selected monthly contracts are extended to the end of the next month.

☐ Print Updated Invoices
Prints a list of all the customer and supplier invoices that were updated after the month end has been completed.

☐ Email Statements
Mail customer/supplier statement directly after the reservation has rolled

Select All Select None

Setup Customer Email Setup Supplier Email Proceed >> Cancel

If the option is selected to 'Continue Rental', Novtel will create another monthly reservation for all selected 'Month-To-Month' reservations.

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help

01 Sep 2022 02 Sep 2022 03 Sep 2022 04 Sep 2022 05 Sep 2022 06 Sep 2022 07 Sep 2022 08 Sep 2022 09 Sep 2022 10 Sep 2022 11 Sep 2022 12 Sep 2022 13 Sep 2022 14 Sep 2022 15 Sep 2022 16 Sep 2022 17 Sep 2022 18 Sep 2022 19 Sep 2022 20 Sep 2022 21 Sep 2022 22 Sep 2022 23 Sep 2022 24 Sep 2022 25 Sep 2022 26 Sep 2022 27 Sep 2022 28 Sep 2022 29 Sep 2022 30 Sep 2022 01 Oct 2022 02 Oct 2022 03 Oct 2022 04 Oct 2022 05 Oct 2022 06 Oct 2022 07 Oct 2022 08 Oct 2022 09 Oct 2022 10 Oct 2022 11 Oct 2022 12 Oct 2022 13 Oct 2022 14 Oct 2022 15 Oct 2022 16 Oct 2022 17 Oct 2022 18 Oct 2022 19 Oct 2022 20 Oct 2022 21 Oct 2022 22 Oct 2022 23 Oct 2022 24 Oct 2022 25 Oct 2022 26 Oct 2022 27 Oct 2022 28 Oct 2022 29 Oct 2022 30 Oct 2022

A001 A001A A001B A002 A003 A004 A005 B001 B002 CAM001

40 West, Frank 41 West, Frank

West, Frank RA No: 17 Status: On Rent

Contract Manager

Contract Number 7 Type Month-To-Month Cancel Contract

Customer WES001 West, Frank

Date Start 1 September 2022 Contract Completed Contract Completed 2 Months

Vehicles Subhires Fixed Rates SH Fixed Rates

A003 - Fiat Palio

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
40	2022/09/01	2022/09/30	Termed	3500.00
41	2022/10/01	2022/10/31	On Rent	3500.00



Billing Month-To-Month Contracts (Terminate Rental)

Recurring Billing

Current Month: October Current Year: 2022

Fixed Contracts Active Monthly Customers Fixed Hire Purchase Payments Weekly Contracts Active Weekly Irregular Monthly

Res Number	Customer Code	Customer Description	Vehicle Code	Status	Date Start	Date End
41	WES001	West, Frank	A003	On Rent	2022/10/01	2022/10/31

Month End Options

Update Customer And Supplier Invoices

☐ Continue Reservation
All selected monthly contracts are extended to the end of the next month.

☐ Print Updated Invoices
Prints a list of all the customer and supplier invoices that were updated after the month end has been completed.

☐ Email Statements
Mail customer/supplier statement directly after the reservation has rolled

Select All Select None

Setup Customer Email Setup Supplier Email Proceed >> Cancel

If the 'Continue Rental' option is **not** selected at the next recurring billing process, the contract will **not** be continued. The User will mark the contract as completed and the 'End Date' will be inserted.

Contract Manager

Contract Number: 7 Type: Month-To-Month Cancel Contract

Customer: WES001 West, Frank

Date Start: 1 September 2022 Date End: 31 October 2022 2 Months

Contract Completed ☒

Vehicles Subhires Fixed Rates SH Fixed Rates

A003 - Fiat Palio

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
40	2022/09/01	2022/09/30	Termed	3500.00
41	2022/10/01	2022/10/31	Termed	3500.00

Calculate Commission 0 Apply Commission View Reservation Escalations

Save Cancel



Fixed weekly contracts can be created and billed on a weekly basis too.

The 'Fixed Weekly' Contract Option is selected in this case, and the number of weeks will be calculated according to the date range selected.

In this case, 2 reservations will be created for the selected vehicle to manage each reservation individually.

The 2 reservations are now displayed on the Grid and linked to individual reservation numbers.

Page 51



The reservations linked to this contract is displayed in the 'Recurring Billing Billing's 'Weekly Contracts' tab and can now be billed.



Week-To Week Contracts

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help

Contract Manager

Contract Number 9 Type **Week-To-Week** Cancel Contract

Customer AND001 Anderson, Peter

Date Start 1 September 2022 Contract Completed 1 Weeks

Vehicles Subhires Fixed Rates SH Fixed Rates

A004 - Opel Corsa Lite

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
44	2022/09/01	2022/09/04	Provisional	1000.00

Calculate Commission 0 Apply Commission View Reservation Escalations

Save Cancel

When creating a 'Week-to-Week' contract, only 1 reservation will be created for the selected vehicle when the contract is saved.

In the Recurring Billing window, the 'Active Weekly' tab displays this type of contract and can either be continue for another week if so selected, or the rental contract can be completed upon performing the billing process.

Recurring Billing

From 2022/09/01 To 2022/09/30

Fixed Contracts Active Monthly Customers Fixed Hire Purchase Payments Weekly Contracts **Active Weekly** Irregular Monthly

Res Number	Contract No	Customer Code	Customer Description	Vehicle Code	Status	Date Start	Date End
44	9	AND001	Anderson, Peter	A004	Provisional	2022/09/01	2022/09/04

Week End Options

Update Customer And Supplier Invoices

☒ **Continue Reservation**
All selected weekly contracts are extended to the end of the next week.

☐ Print Updated Invoices
Prints a list of all the customer and supplier invoices that were updated after the week end has been completed.

☐ Email Statements
Mail customer/supplier statement directly after the reservation has rolled

Setup Customer Email Setup Supplier Email Proceed >> Cancel

Update Selected Invoices

Close



Irregular Monthly Reservations

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.6 - [Item Grid]

File Edit Modify Setup Process Reports Help

Reservation Details

General Financial Additional Costs Additional Drivers Quick View

Vehicle Number: A001 Datsun Go Duration Charged: 29

Reservation Number: 15 RA Number: 0 Category: A4 - 22-28 Days

Order Number: Customer Code: AND003 Search: <F5>

Description: Andena, Walter

Comments:

Delivery Address: KM Out: 0 KM In: 0 KM Used: 0 KM Free: 21750 KM Charged: 0 Fuel Used: 0

Pickup Address:

Date Out: 2022/06/04 Time Out: 08:00:00

Date In: 2022/07/03 Time In: 08:00:00

Estimated Time Due: 08:00:00 Payment Type:

Cancelled Provisional Confirmed On Rent Termed Non Rev Non Rev Return Paid Replaced

An 'Irregular Monthly' reservation refers to a reservation which does not start on the first day of the month, and does not end on the last day of the month.

This type of reservation is created directly on the Grid for a period of 1 month, but the date range starts within 1 month and ends in another.

For example:

Reservation 15 was created from the 4th of June until the 3rd of July.

Recurring Billing

Current Month: July Current Year: 2022

Fixed Contracts Active Monthly Customers Fixed Hire Purchase Payments Weekly Contracts Active Weekly Irregular Monthly

Res Number	Customer Code	Customer Description	Vehicle Code	Status	Date Start	Date End
✓ 15	AND003	Andena, Walter	A001	On Rent	2022/06/04	2022/07/03

Select All Select None Update Selected Invoices Close

In the 'Recurring Billing' screen, the reservation will be displayed in the 'Irregular Monthly' tab during the month the reservation ends, but not in the reservation's start month.



Contracts for Sub-Rented Vehicles

The 'Edit Vehicle' window is shown with the 'General' tab selected. The 'Code' field contains 'A006' and the 'Description' field contains 'Datsun Go'. The 'Branch' dropdown is set to 'Cape Town, South Africa'. The 'Registration Number' is 'Subhired', 'Manufacturer' is 'Datsun', and 'Type' is 'Car/Automobile'. The 'Subhire Item' checkbox is checked and highlighted with a red box. Other checkboxes include 'Show On Grid' (checked), 'Hire Purchase', 'Monthly Billed Item', 'Maintenance Item', 'Additional Daily Hire Item', 'Disposed', and 'PAX Vehicle' (unchecked). 'Accept' and 'Cancel' buttons are at the bottom.

When your fleet's availability is depleted, a vehicle can be sub-rented from another company.

The vehicle is created in Novtel and classified as a 'Subhire Item'.

The 'Supplier' will also be linked to this vehicle in the 'Financial' tab.

The 'Edit Vehicle' window is shown with the 'Financial' tab selected. The 'Code' is 'A006' and 'Description' is 'Datsun Go'. Financial fields include 'Cost Price' (0.00), 'Rental Per Day Excl Tax' (260.87), 'Tax' (39.13), and 'Rental Per Day Incl Tax' (300.00). The 'Default Charges' section lists 'Insurance Charge' (INS001 - Basic Insurance Group), 'Contract Charge', and 'Excess KM Charge' (EXC001 - Excess Kilometers). The 'Date Of Purchase' is '2022/09/23' and 'Replacement Value' is '0.00'. The 'Supplier Code' is 'PRE001' and the 'Supplier Name' is 'Premium Car Rentals', both highlighted with red boxes. The 'Monthly Payment' is '0.00'. 'Accept' and 'Cancel' buttons are at the bottom.



Contracts for Sub-Rented Vehicles

When the vehicle is selected on the contract, the rental amount is set in the 'Escalations' screen.

This is the rental amount charged to the Customer.

Contract Manager

Contract Number10

TypeFixed Monthly

Cancel Contract

CustomerPAT001

Patterson, Elize

Date Start1 September 2022

Date End31 December 2022

4Months

Vehicles

Subhires

Fixed Rates

SH Fixed Rates

A006 - Datsun Go

Add Vehicle

Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
50	2022/09/01	2022/09/30	Provisional	3500.00
51	2022/10/01	2022/10/31	Provisional	3500.00
52	2022/11/01	2022/11/30	Provisional	3500.00
53	2022/12/01	2022/12/31	Provisional	3500.00

Calculate Commission

10

Apply Commission

View Reservation

Escalations

Save

Cancel

In the 'Sub-Hires' tab, the subrental reservations are also created automatically – and the amount inserted according to the applied commission percentage set in the 'Vehicles' tab.

The amount indicated here, is payable to the Supplier of the vehicle.

Contract Manager

Contract Number10

TypeFixed Monthly

Cancel Contract

CustomerPAT001

Patterson, Elize

Date Start1 September 2022

Date End31 December 2022

4Months

Vehicles

Subhires

Fixed Rates

SH Fixed Rates

A006 - Datsun Go

SR Num	Supplier	Date Start	Date End	Inv Total
2	PRE001 - Premium Car Rentals	2022/09/01	2022/09/30	3150.00
3	PRE001 - Premium Car Rentals	2022/10/01	2022/10/31	3150.00
4	PRE001 - Premium Car Rentals	2022/11/01	2022/11/30	3150.00
5	PRE001 - Premium Car Rentals	2022/12/01	2022/12/31	3150.00

View Subhire

Escalations

Save

Cancel



Contracts for Sub-Rented Vehicles

Contract Manager

Contract Number: 10 Type: Fixed Monthly Cancel Contract

Customer: PAT001 Patterson, Elize

Date Start: 1 September 2022 Date End: 31 December 2022 4 Months

Vehicles		Subhires		Fixed Rates		SH Fixed Rates	
Line Type	Rate	Description	Qty	Excl	Tax	Incl	
Item	AD001	Additional Driver	1	86.96	13.04	100.00	
Item	INS002	Insurance - Monthly	1	1043.48	156.52	1200.00	

1130.43 169.57 1300.00

Add Rates To Vehicles ✓ Add Remark Add Delete

Save Cancel

In the 'Fixed Rates' tab, additional costs can be added and updated to the reservations linked to the contract.

The Invoice total to the Customer will now be increased accordingly.

Contract Manager

Contract Number: 10 Type: Fixed Monthly Cancel Contract

Customer: PAT001 Patterson, Elize

Date Start: 1 September 2022 Date End: 31 December 2022 4 Months

Vehicles Subhires Fixed Rates SH Fixed Rates

A006 - Datsun Go

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
50	2022/09/01	2022/09/30	Provisional	4800.00
51	2022/10/01	2022/10/31	Provisional	4800.00
52	2022/11/01	2022/11/30	Provisional	4800.00
53	2022/12/01	2022/12/31	Provisional	4800.00

Calculate Commission 10 Apply Commission View Reservation Escalations

Save Cancel



Contracts for Sub-Rented Vehicles

Contract Manager

Contract Number: 10 Type: Fixed Monthly Cancel Contract

Customer: PAT001 Patterson, Elize

Date Start: 1 September 2022 Date End: 31 December 2022 4 Months

Vehicles		Subhires		Fixed Rates		SH Fixed Rates	
Line Type	Rate	Description	Qty	Excl	Tax	Incl	
Item	AD001	Additional Driver	1	86.96	13.04	100.00	
Item	INS002	Insurance - Monthly	1	1043.48	156.52	1200.00	

1130.43 169.57 1300.00

Add Rates To Subhires Add Remark Add Delete

Save Cancel

Fixed rates payable to the Supplier, will be added to the 'SH Fixed Rates' tab and updated to the Sub-rental reservations.

The Invoice Total for all Sub-Rental Reservations will now also be increased accordingly.

Contract Manager

Contract Number: 10 Type: Fixed Monthly Cancel Contract

Customer: PAT001 Patterson, Elize

Date Start: 1 September 2022 Date End: 31 December 2022 4 Months

Vehicles Subhires Fixed Rates SH Fixed Rates

A006 - Datsun Go

SR Num	Supplier	Date Start	Date End	Inv Total
2	PRE001 - Premium Car Rentals	2022/09/01	2022/09/30	4450.00
3	PRE001 - Premium Car Rentals	2022/10/01	2022/10/31	4450.00
4	PRE001 - Premium Car Rentals	2022/11/01	2022/11/30	4450.00
5	PRE001 - Premium Car Rentals	2022/12/01	2022/12/31	4450.00

View Subhire Escalations

Save Cancel



Contracts for Sub-Rented Vehicles

Subhire Vehicle

Subhire Number : 2 Reservation : 50

Date Start : 2022/09/01 Vehicle to be subhired : Datsun Go

Date End : 2022/09/30 Customer : PAT001 Patterson, Elize

Supplier : PRE001 Premium Car Rentals

Financial Additional Costs Quick View

Contact Person :
Registration Number :
Supplier Reservation Number :
Order Number :
Supplier Invoice Number :
Remarks :
Duration Charged : 1 Price Lists :

Buy Price Per Day :
Price (Excl) : 2739.13 Rental Total (Excl) : 2739.13
Tax : 410.87 Rental Total Tax : 410.87
Price (Incl) : 3150.00 Rental Total (Incl) : 3150.00

Selling Price Per Day :
Price (Excl) : 0.00
Tax : 0.00
Price (Incl) : 0.00

Nett Profit/Loss :
Customer Invoice Excl Total : 4173.91
Supplier Invoice Excl Total : 3869.56 Gross Excl Profit : 304.35

Accept Cancel

Viewing the actual Sub-rental reservation for September 2022, the 'Nett Profit/Loss' section indicates the following:

- ✓ The Customer Invoice amount exclusive of VAT - payable to your company.
- ✓ The amount exclusive of VAT payable to the Supplier.
- ✓ And the Commission amount – exclusive of VAT – to be retained by your company.

Subhire Vehicle

Subhire Number : 2 Reservation : 50

Date Start : 2022/09/01 Vehicle to be subhired : Datsun Go

Date End : 2022/09/30 Customer : PAT001 Patterson, Elize

Supplier : PRE001 Premium Car Rentals

Financial Additional Costs **Quick View**

Description	Qty	Tax	Excl Price	Incl Price
Datsun Go	1	410.87	2739.13	3150.00
AD001 - Additional Driver	1	13.04	86.96	100.00
INS002 - Insurance - Monthly	1	156.52	1043.48	1200.00
Total		580.44	3869.56	4450.00

Nett Profit/Loss :
Customer Invoice Excl Total : 4173.91
Supplier Invoice Excl Total : 3869.56 Gross Excl Profit : 304.35

Accept Cancel

In the 'Quick View' tab, the overview of the Supplier's costs due, is listed.

8

Accessing the Reservations linked to a Contract



Accessing Reservations Linked to a Contract

A reservation can be accessed by means of these methods:

1. From the contract by clicking on the reservation and then on 'View Reservation'.

2. Or by simply double clicking on the reservation directly on the Grid.

Contract Manager

Contract Number: 6 Type: Fixed Monthly Cancel Contract

Customer: AND001 Anderson, Peter

Date Start: 1 September 2022 Date End: 28 February 2023 6 Months

Vehicles Subhires Fixed Rates SH Fixed Rates

B002 - Volkswagen Polo Sedan (A)

Add Vehicle Remove Vehicle

Rental Num	Date Start	Date End	Status	Inv Total
34	2022/09/01	2022/09/30	Termed	5100.00
35	2022/10/01	2022/10/31	On Rent	5100.00
36	2022/11/01	2022/11/30	Provisional	5100.00
37	2022/12/01	2022/12/31	Provisional	5100.00
38	2023/01/01	2023/01/31	Provisional	5100.00
39	2023/02/01	2023/02/28	Provisional	5100.00

Calculate Commission: 0 Apply Commission

View Reservation Escalations

Save Cancel

Anderson, Peter RA No : 16 Status : On Rent
35 Anderson, Peter



Accessing Reservations Linked to a Contract

The selected reservation contains 5 tabs, namely:

1. The 'General' Tab

The 'General' tab displays reservation information. The 'General' tab is highlighted with a red box. Fields include Vehicle Number (B002), Reservation Number (35), RA Number (16), Category (B - Group B), Order Number, Customer Code (AND001), Description (Anderson, Peter), Comments, Delivery Address, Pickup Address, KM Out (10235), KM In (0), KM Used (0), KM Free (0), KM Charged (0), Fuel Used (0), Date Out (2022/10/01), Time Out (08:00:00), Date In (2022/10/31), Time In (08:00:00), Estimated Time Due (00:00:00), Payment Type, Remarks, and Status (On Rent). Buttons at the bottom include View Audit Log, Accept, and Cancel.

2. Financial

The 'Financial' tab displays financial details. The 'Financial' tab is highlighted with a red box. Fields include Price (Incl) (3900.00), Price (Excl) (3391.30), Tax (508.70), Duration Charged (1), Invoice Total (5100.00), Deposit Calculated By (Percentage, Amount), Deposit Amount (0.00), Rental Charge Incl / Excl (Rental Charge Per Day (Incl) 3900.00, Rental Charge Per Day (Excl) 3391.3), Applicable Rates Incl Tax (Insurance Charge Per Day 0.00, Contract Fee 0.00, Premium Amount 0.00 0.00, Standard Insurance 0.00 0.00, Super Cover Insurance 0.00 0.00), Agent Code, and Description. Buttons at the bottom include View Audit Log, Accept, and Cancel.

3. Additional Costs

The 'Additional Costs' tab displays a table of additional costs. The 'Additional Costs' tab is highlighted with a red box. The table has columns: Line Type, Rate, Description, Qty, Excl, Tax, and Incl. The table contains one row: Item, INS002, Insurance - Monthly, 1, 1043.48, 156.52, 1200.00. Summary values at the bottom are 1043.48, 156.52, and 1200.00. Buttons at the bottom include View Audit Log, Add Remark, Add, Delete, Accept, and Cancel.

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	INS002	Insurance - Monthly	1	1043.48	156.52	1200.00



Accessing Reservations Linked to a Contract

4. Additional Drivers

Reservation Details

General

Financial

Additional Costs

Additional Drivers

Quick View

Driver 1

First & Last Name

Licence Number

Passport Number

ID Number

Driver 2

First & Last Name

Licence Number

Passport Number

ID Number

Driver 3

First & Last Name

Licence Number

Passport Number

ID Number

Copy Additional Drivers From Previous Reservation

View Audit Log

Accept

Cancel

5. Quick View

Reservation Details

General

Financial

Additional Costs

Additional Drivers

Quick View

Description	Qty	Tax	Excl	Incl
Volkswagen Polo Sedan (A)	1	508.70	3391.30	3900.00
INS002 - Insurance - Monthly	1	156.52	1043.48	1200.00
TOTAL DUE		665.22	4434.78	5100.00

View Audit Log

Accept

Cancel

9

Short Term Reservations





Short Term Reservations

Novtel Vehicle Hire Ultimate Enterprise 6.2.0.9 - [Item Grid]

File Edit Modify Setup Process Reports Help

Reservation Details

General Financial Additional Costs Additional Drivers Quick View

Customer Setup

Number	Description	Telephone	Fax
AND001	Anderson, Peter	021 456123	
PAT001	Patterson, Elize	011 741258	
STA001	Stanton Travels	011 123456	
WES001	West, Frank		

Search:

☒ Number ☐ Description

Select Close

Accept Cancel

Short Term Reservations are created directly on the Grid.

In the date column next to the required vehicle, and on the start date, click; hold; drag and release the mouse button on the requested end date.

For example: A reservation is made for vehicle code A005, and from 17 - 20 September 2022.

Upon releasing the mouse button, a Customer must be selected. If the Customer already exists in the Novtel system, search for and select the Customer.

If not, create the Customer, save the master file, and select it.



Short Term Reservations

A reservation number is only created once the reservation is saved.

Now the reservation on the Grid displays the allocated Reservation Number, as well as the Customer's name.

To access the reservation, simply double-click on it.



Short Term Reservations

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A005 Toyota Tazz Duration Charged: 4

Reservation Number: 45 RA Number: 0 Category: A1 - 1-7 Days

Order Number: Customer Code: PAT001 Search <F5>

Description: Patterson, Elize

Comments: The Vehicle must be ready at 7am sharp.

Delivery Address: Pickup Address:

KM Out: 0 KM In: 0 KM Used: 0 KM Free: 1200 KM Charged: 0 Fuel Used: 0

Date Out: 2022/09/17 Time Out: 08:00:00

Date In: Time In:

Estimated Time D: Payment Type:

Remarks: Request: Roof Rack and Car Seat

View Audit Log Accept Cancel

In the General tab, the following information can be entered:

Comments and Remarks – which will be displayed on the 'Comments and Remarks' report

Booking Comments and Remarks				
Date From 17/09/2022 To 21/09/2022				
Booking No	Vehicle	Customer	Comments	Remarks
45	Toyota Tazz	Patterson, Elize	The Vehicle must be ready at 7am sharp.	Request: Roof Rack and Car Seat



Short Term Reservations

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A005 Toyota Tazz Duration Charged: 4 **2**

Reservation Number: 45 RA Number: 0 Category: A1 - 1-7 Days Clear

Order Number:

Customer Code: PAT001 Search <F5>

Description: Patterson, Elize

Comments: The Vehicle must be ready at 7am sharp.

Delivery Address **1**

Pickup Address:

KM Out: 0
KM In: 0
KM Used: 0

Remarks: Request: Roof Rack and Car Seat

View Audit Log

1. If applicable, a delivery and pickup address can be added, and which will be displayed on the 'Deliveries' and 'Collection' reports respectively for the selected dates.

2. Duration Charged VS Category

In this case, the vehicle is rented for 4 days, and the daily rate as entered on the selected category, will be charged.

The rental amount - as derived from the linked Category – is displayed in the 'Financial' tab.

In this case, the daily rental amount of R300.00 – inclusive of VAT – is charged, and therefore the Price Inclusive of VAT total for the rental ONLY, is R1200.00.

Reservation Details

General | **Financial** | Additional Costs | Additional Drivers | Quick View

Price (Incl): 1200.00 Duration Charged: 4

Price (Excl): 1043.48

Tax: 156.52 Invoice Total: 1200.00

Deposit Calculated By: ☐ Percentage ☒ Amount

Date Raised: 2022-09-21

☐ Deposit Paid

☐ Deposit Applied

Deposit Amount: 0.00

Rental Charge Incl / Excl:

Rental Charge Per Day (Incl)	300.00
Rental Charge Per Day (Excl)	260.87

Applicable Rates Incl Tax:

Insurance Charge Per Day	40.00
Contract Fee	60.00
Premium	Amount
Standard Insurance	0.00 0.00
Super Cover Insurance	0.00 0.00

Agent Code:

Description:

View Audit Log

Accept Cancel



Short Term Reservations

Reservation Details

General

Financial

Additional Costs

Additional Drivers

Quick View

Line Type	Rate	Description	Qty	Excl	Tax	Incl
-----------	------	-------------	-----	------	-----	------

0.00

0.00

0.00

Add Remark

Add

Delete

View Audit Log

Accept

Cancel

In the Additional Costs tab, any relevant charge can be added by clicking 'Add'.

The 'Select Rate' window is now displayed, and the relevant charges can be added individually.

Select Rate

Search

Search By

Code

Search For

Code	Description	Excl	Tax	Incl
AD001	Additional Driver	86.96	13.04	100.00
BRE001	Break Pads - Datsun Go 2015 Model	304.35	45.65	350.00
C001	Car Seat	17.39	2.61	20.00
EXC001	Excess Kilometers	8.70	1.30	10.00
INS001	Basic Insurance Group A Vehicles	521.74	78.26	600.00
INS002	Insurance - Monthly	1043.48	156.52	1200.00
R001	Roof Rack	17.39	2.61	20.00

Accept

Cancel

Reservation Details

General

Financial

Additional Costs

Additional Drivers

Quick View

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	C001	Car Seat	1	17.39	2.61	20.00
Item	R001	Roof Rack	1	17.39	2.61	20.00
Item	INS001	Basic Insurance Group A Vehicles	1	521.74	78.26	600.00

556.52

83.48

640.00

Add Remark

Add

Delete

View Audit Log

Accept

Cancel



Short Term Reservations

Reservation Details

General **Financial** Additional Costs Additional Drivers Quick View

Price (Incl) 1200.00 Duration Charged 4

Price (Excl) 1043.48

Tax 156.52 Invoice Total 1840.00

The added charges will now influence the 'Invoice Total' amount in the 'Financial' tab.

Proceeding to the 'Quick View' tab, all added items are listed, and which will currently be displayed on the Invoice.

Reservation Details

General Financial Additional Costs Additional Drivers **Quick View**

Description	Qty	Tax	Excl	Incl
Toyota Tazz	4	156.52	1043.48	1200.00
C001 - Car Seat	1	2.61	17.39	20.00
R001 - Roof Rack	1	2.61	17.39	20.00
INS001 - Basic Insurance Group A Vehic	1	78.26	521.74	600.00
TOTAL DUE		240.00	1600.00	1840.00

View Audit Log Accept Cancel

However: please note that the excess kilometres and fuel used will be added when the vehicle is returned, and before issuing the final invoice.



Short Term Reservations

Reservation Details

General Financial Additional Costs **Additional Drivers** Quick View

Driver 1

First & Last Name

Licence Number ID Number

Passport Number

Driver 2

First & Last Name

Licence Number ID Number

Passport Number

Driver 3

First & Last Name

Licence Number ID Number

Passport Number

Copy Additional Drivers From Previous Reservation

View Audit Log Accept Cancel

ADDITIONAL DRIVERS

Up to 3 additional drivers can be added to this reservation if required, and the costs can be added to the 'Additional Costs' tab as well.



Short Term Reservations

The screenshot displays the 'Vehicle Hire' software interface. At the top, a list of reservations is shown. A red arrow points from the '45 Patterson, Elize' entry to a context menu. The menu options are: View Details <F5>, Job, Documents, Status, Record Change-Over, Record Damages, and Print Check List. The 'Status' option is highlighted, and a sub-menu is open showing the following options: Cancelled, Provisional, Confirmed, On Rent (checked with a green checkmark), Termed, and Non Rev.

Below the list, a 'Reservation Details' window is open, showing the following information:

- Reservation Number: 45
- PAT001 Patterson, Elize
- PO Box 4213
- 56 Jasper Str
- Sandton
- Job: Sandton
- Telephone: 011 741258
- ID Number: [blank]

The 'Reservation Details' window has tabs for General, Financial, Additional Costs, Additional Drivers, and Quick View. The 'General' tab is active, showing the following fields:

- Vehicle Number: A005
- Toyota Tazz
- Duration Charged: 4
- Reservation Number: 45
- RA Number: 18
- Category: A1 - 1-7 Days
- Order Number: [blank]
- Customer Code: PAT001
- Description: Patterson, Elize
- Comments: The Vehicle must be ready at 7am sharp.
- Delivery Address: [blank]
- Pickup Address: [blank]
- KM Out: 145230
- KM In: 0
- KM Used: 0
- KM Free: 1200
- KM Charged: 0
- Fuel Used: 0
- Date Out: 2022/09/17
- Time Out: 07:00:00
- Date In: 2022/09/21
- Time In: 08:00:00
- Estimated Time Due: 08:00:00
- Payment Type: [blank]
- Remarks: Request: Roof Rack and Car Seat
- Status: On Rent

At the bottom of the window, there are buttons for 'View Audit Log', 'Accept', and 'Cancel'.

On Rent Vehicles

When the vehicle is handed to the Customer, they will be required to sign the rental agreement, and their credit card details must be verified.

The status of the reservation will be changed to 'On Rent', and the reservation's colour will also change accordingly.

The current kilometres are recorded in the 'KM Out' field.



Short Term Reservations

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A005 Toyota Tazz Duration Charged: 4

Reservation Number: 45 RA Number: 18 Category: A1 - 1-7 Days Clear

Order Number:

Customer Code: PAT001 Search <F5>

Description: Patterson, Elize

Comments: The Vehicle must be ready at 7am sharp.

Delivery Address:

Pickup Address:

KM Out: 145230
KM In: 148952
KM Used: 3722
KM Free: 1200
KM Charged: 2522
Fuel Used: 1\$

Date Out: 2022/09/17
Time Out: 07:00:00

Date In: 2022/09/21
Time In: 08:00:00

Estimated Time Due: 08:00:00

Payment Type:

Remarks: Request: Roof Rack and Car Seat

Status: On Rent

View Audit Log Accept Cancel

Returning a Vehicle

When a vehicle is returned, the status cannot be changed to 'Termed' if the current kilometres have not been recorded.

1. Therefore, the User will access the reservation, and enter the odometer reading as at present in the 'KM In' field.
2. Novtel will automatically calculate the number of kilometres used and deduct the free kilometres to indicate the number of excess kilometres to be charged.
3. If the vehicle is filled up upon return, the fuel used will be entered and must also be charged.



Short Term Reservations

Reservation Details

General Financial **Additional Costs** Additional Drivers Quick View

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	C001	Car Seat	1	17.39	2.61	20.00
Item	R001	Roof Rack	1	17.39	2.61	20.00
Item	INS001	Basic Insurance Group A Vehicles	1	521.74	78.26	600.00
Item	EXC001	Excess Kilometers	2522	5482.61	822.39	6305.00
Item	FUE001	Fuel Used (Petrol)	15	316.04	47.41	363.45

6355.17 953.28 7308.45

Add Remark Add Delete

View Audit Log Accept Cancel

PLEASE NOTE:

If the default charge for excess kilometres to be charged were linked to the Vehicle Master File, Novtel will instantly insert the charge as a line item and calculate the total in the 'Additional Cost' tab.

However: If not, it must be added here, and the quantity entered as the actual kilometres used.

The fuel charge will also be selected, and the litres used, entered in the 'QTY' column.

Reservation Details

General Financial Additional Costs Additional Drivers **Quick View**

Description	Qty	Tax	Excl	Incl
Toyota Tazz	4	156.52	1043.48	1200.00
C001 - Car Seat	1	2.61	17.39	20.00
R001 - Roof Rack	1	2.61	17.39	20.00
INS001 - Basic Insurance Group A Vehic	1	78.26	521.74	600.00
EXC001 - Excess Kilometers	2522	822.39	5482.61	6305.00
FUE001 - Fuel Used (Petrol)	15	47.41	316.04	363.45
TOTAL DUE		1109.80	7398.65	8508.45

View Audit Log Accept Cancel

Reservation Details

General **Financial** Additional Costs Additional Drivers Quick View

Price (Incl) 1200.00 Duration Charged 4

Price (Excl) 1043.48

Tax 156.52

Invoice Total 8508.45

The 'Invoice Total' in the 'Financial Tab' will correspond with the total indicated in the 'Quick View' tab.



Short Term Reservations

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A005 Toyota Tazz Duration Charged: 4

Reservation Number: 45 RA Number: 18 Category: A1 - 1-7 Days

Order Number: Customer Code: PAT001 Search <F5>

Description: Patterson, Elize

Comments: The Vehicle must be ready at 7am sharp.

Delivery Address: Pickup Address:

KM Out	145230
KM In	148952
KM Used	3722
KM Free	1200
KM Charged	2522
Fuel Used	0

Date Out: 2022/09/17 Time Out: 07:00:00

Date In: 2022/09/21 Time In: 08:00:00

Estimated Time Due: 08:00:00 Payment Type:

Remarks: Request: Roof Rack and Car Seat

Status: **Termed** 1

Update Invoice View Audit Log

The final invoice can now be issued - PROVIDED that no damages occurred for which the Customer is liable for the payment thereof.

A Checklist is also produced to check that the battery; tyres and spare tyre brands, as well as all other items listed for this vehicle, are correct; present and in good order.

Invoicing reservations

1. Upon changing the status of the reservation to 'Termed', the 'Update Invoice' button is activated.
2. Clicking on the button, the Invoice can be updated by clicking 'Yes', and 'OK'.

Novtel Vehicle Hire

Update invoice ?

Yes No

Novtel Vehicle Hire

Invoice update successful.

OK



Vehicle Hire (VH)

FILE EDIT PROCESS VIEW CHANGE SETUP UTILITY WINDOW FAVOURITES HELP

Icons: [File Explorer] [List View] [Group View] [Add] [Banking] [Document] [Calculator] [People] [Shopping Cart] [Pie Chart] [Line Graph] [Dollar Sign] [Printer] [Bar Chart] [Lightning Bolt] [Mail] [Compass] [Pencil] [Speech Bubble] [Question Mark]

Process Customer

Document Type Tax Invoice		Number IN100004		Customer PAT001 Patterson, Elize	
Link / Create		Delivery Address		Ship / Deliver Postal Address Terms 0 days Freight Method Ship / Deliver Current Balance 0.00 Credit Limit 0.00	
<input checked="" type="checkbox"/> Inclusive	<input type="checkbox"/> Quick Mode				
<input type="checkbox"/> Customer User Defined Fields	<input type="checkbox"/> On Hold				

Period	Date	Customer Ref	Sales Code	Discount %	Exch. Rate	Terms	Payment Due
7	2022/09/21	45		0.00	1.000000	00	2022/09/21

Type	Code	Description	Project	Unit	Quantity	Serial	Tax	Inc Price	Disc%	Nett	Li
Access Denied	RENT	Toyota Tazz			4.00		01	300.00		1 200.00	
Access Denied	RENT	Car Seat			1.00		01	20.00		20.00	
Access Denied	RENT	Roof Rack			1.00		01	20.00		20.00	
Access Denied	INS001	Basic Insurance Group A Vehicles			1.00		01	600.00		600.00	
Access Denied	B002	Excess Kilometers			2 522.00		01	2.50		6 305.00	
Access Denied	FUE001	Fuel Used (Petrol)			15.00		01	24.23		363.45	
7 Remarks	'										
7 Remarks	'										
7 Remarks	'	NOVTEL NOTE:									
7 Remarks	'	Booking was									
7 Remarks	'	generated									
7 Remarks	'	by Novtel									
7 Remarks	'	Vehicle Hire -									
7 Remarks	'	Reservation NR : 45									
7 Remarks	'										
7 Remarks	'	Time Out : 07:00:00									
7 Remarks	'	Date Out : 2022/09/17									

Thank you for your support.
Please keep this invoice as proof of purchase.

<F10> Receipt

Discount	
Exclusive	7 463.55
Tax	1 044.90
TOTAL	8 508.45

Batch... Delete / Insert... Edit Document Next Document Print Document Additional Fields Close

The invoice will also be available in Sage Pastel immediately.

10

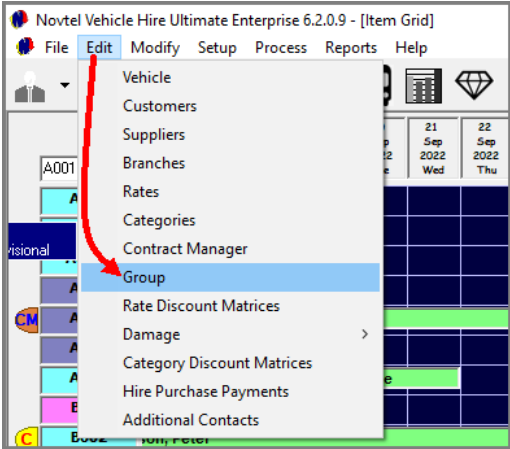
Group Reservations





Group Reservations

A Group Reservation can be created for more than 1 vehicle to be rented, and a single invoice will be issued to the Group 'Owner' for all selected vehicles.



Group Details

Group Number : 1

Group Description : Stanton Travels

General Reservations Additional Costs

Invoice Number :

Customer Code : STA001

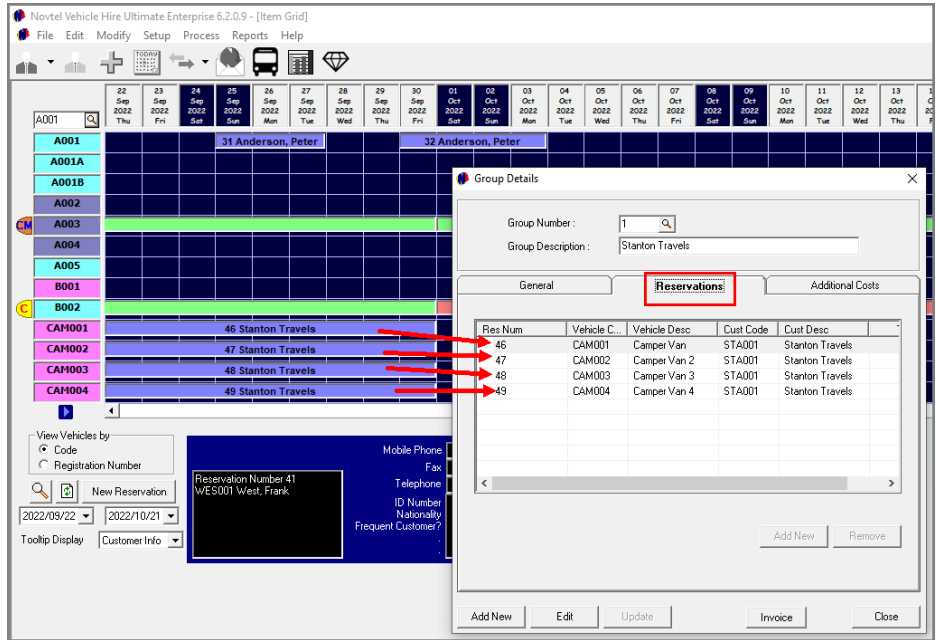
Customer Description : Stanton Travels

Start Date : 2022/09/22 End Date : 2022/09/30

Group Status : Provisional

Group Comments :

Add New Edit Update Invoice Close



TAX INVOICE

Date : 2022/09/22

Start Date : 9/22/2022

End Date : 9/30/2022

Invoice Number :

EVH

44 Great Avenue

Belville

Cape Town

0000

Stanton Travels

PO Box 654

Sandton

Johannesburg

0200

Tel : 044 895 123

Fax :

Email : Expert@vehiclehire.co.za

VAT No : 123456789

VAT No :

RESERVATIONS

Code	Description	Duration	Tax	Incl
CAM 001	Camper Van Stanton Travels Booking Number : 46	8	R375.65	R2 880.00
CAM 002	Camper Van 2 Stanton Travels Booking Number : 47	8	R375.65	R2 880.00
CAM 003	Camper Van 3 Stanton Travels Booking Number : 48	8	R375.65	R2 880.00
CAM 004	Camper Van 4 Stanton Travels Booking Number : 49	8	R375.65	R2 880.00

ADDITIONAL COSTS

Code	Description	Qty	Tax	Incl
AD001	Additional Driver	9	R117.39	R900.00
INS003	Insurance - Camper Vans	91	R2 373.91	R18 200.00

Page : 1

Tax Total : R3 993.91

Excl Total : R26 626.09

Incl Total : R30 620.00

11

Managing Damages



Managing Damages

Novtel keeps a complete record of all damages on a vehicle – whether on the outside, or inside.

An unlimited number of 'Damaged Parts' can be created. This may include items such as:

- ✓ Door – Left Front
- ✓ Door – Right Front
- ✓ Headlight – Left
- ✓ Headlight - Right

Various 'Damage Types' can also be created and may include examples such as:

- ✓ Burned
- ✓ Chipped
- ✓ Cracked
- ✓ Dented
- ✓ Torn

There are 2 ways in which damages can be recorded, namely:

- ✓ On a reservation linked to the 'On Rent' status for a specific vehicle
- ✓ Or by means of the Vehicle Hire Workshop Module



Managing Damages

Recording Damages to a vehicle directly on a 'On Rent' Reservation

Specific damages can be billed to a Customer when they are liable for the payment thereof.
When recording the damages, the option is ticked to 'Invoice Customer for Damage'.

Clicking 'Accept', the damage is immediately and automatically added to the reservation.

Anderson, Peter RA No : 16
Status : On Rent

35 Anderson, Peter

View Details <F5>

Edit Contract

Documents >

Status >

Record Change-Over

Record Damages

Print Check List

Phone 082 123654

Record Damages

Vehicle Code : B002
Vehicle Description : Volkswagen Polo Sedan (A)
Registration Number : CA412

Click on the image below to record a damage

Outside Motor Vehicle:

Inside Motor Vehicle:

Record Damage Number 1

Reservation Number 35
Customer Anderson, Peter
Vehicle Code B002
Vehicle Description Volkswagen Polo Sedan (A) - CA412

Method of Payment
☒ Direct Method ☐ Works Order Method

Damaged Part Front Fender
Damage Type Smashed
Applicable Rate FF01 Polo Front Fender 2650.00
Amount 2650.00
Date Recorded 22 September 2022 09:52:53

☒ Invoice Customer For Damage

Accept Cancel

Damages

☒ All
☐ Damages Only
☐ Repairs Only

Print Check List & Damages

Close

Reservation Details

General Financial Additional Costs Additional Drivers Quick View

Description	Qty	Tax	Excl	Incl
Volkswagen Polo Sedan (A)	1	508.70	3391.30	3900.00
INS002 - Insurance - Monthly	1	156.52	1043.48	1200.00
FF01 - Polo Front Fender	1	345.65	2304.35	2650.00
TOTAL DUE		1010.87	6739.13	7750.00

View Audit Log Accept Cancel

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Managing Damages

Reservation Details

General

Financial

Additional Costs

Additional Drivers

Quick View

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	INS002	Insurance - Monthly	1	1043.48	156.52	1200.00
Item	FF01	Polo Front Fender	1	2304.35	345.65	2650.00
Remark		Damage caused by Customer when				
Remark		pulling into a parking area.				

3347.83

502.17

3850.00

Add Remark

Add

Delete

View Audit Log

Accept

Cancel

A remark can be added to the 'Additional Costs' tab to capture the extend of the damages, and will be displayed on the Invoice as entered.

Tax Invoice - [Bullzip PDF Printer]

Expert
Vehicle and Trailer Hire

From: EVH
Address: 44 Great Avenue
Bellville
Cape Town
0000

Email: Expert@vehiclehire.co.za
VAT Nr: 123456789

To: Anderson, Peter
Address: PO Box 123
Bellville
Cape Town
0100

Tax Ref:

Invoice Date: 2022/09/22
Invoice Number:
Reservation Nr: 35

Description	Excl VAT	VAT	Total Incl VAT
Volkswagen Polo Sedan	3391.30	508.70	3900.00
Insurance - Monthly	1043.48	156.52	1200.00
Polo Front Fender	2304.35	345.65	2650.00
Damage caused by Customer pulling into a parking area.	0.00 0.00		

Please use the following Banking Details:
Account Name: Expert Vehicle and Trailer Hire
Account Number: 123456789
Bank: ABSA
Branch: Mossel Bay

Total EX Vat
VAT
Total Incl VAT

R 6739.13
R 1010.87
R 7750.00

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Managing Damages

The Workshop Module

Novtel also incorporates a Workshop Module. This feature is an add-on module and activated by Novtel Support at a small monthly fee.

Damages can be recorded; vehicle services managed, and job cards issued for specific jobs to be completed by a selected Technician.

And the damages can be billed to the selected Customer for payment.

The screenshot displays the Novtel Vehicle Hire Ultimate Enterprise 6.0.0.0 software interface. The main window is titled 'Novtel Workshop for Vehicle Hire' and shows a 'Work Order Number' of 15. The 'Customer' field is set to 001, 'Description' is Stanton Travels, 'Email Address' is stanton@travels.com, and 'Phone Number' is 088 789 456 123. The 'Damages Recorded to Vehicle' section shows a table with columns 'Damaged Part' and 'Type of Damage'. The 'Record Damages' button is highlighted. The 'Record Damages' window is open, showing the 'Item Code' B0118, 'Item Description' Datsun Go, and 'Registration Number' CAW1256. The 'Item Type' is set to Car. The window displays four vehicle diagrams (side, front, rear, and top) and an interior view. The 'Current Damages' tab is active, showing a table with columns 'No.', 'Damaged Part', 'Type of Damage', and 'Date Recorded'. The table contains one entry: No. 1, Damaged Part: Taillight - Right, Type of Damage: Cracked, Date Recorded: 2020/08/25 8:42. The 'Totals' section shows 'Incl Total' 2850.00 and 'Tax Total' 371.74. The 'Invoice Details' section shows a table with columns 'Transaction #', 'Date', 'Document #', and 'Invoice #'. The 'Record Damages' window has a 'Close' button at the bottom right.

No.	Damaged Part	Type of Damage	Date Recorded
1	Taillight - Right	Cracked	2020/08/25 8:42

12

Hire Purchases



Hire Purchases

Hire-Purchase is an agreement between two parties in which one party purchase an asset from the other party by means of paying a set monthly charge to 'hire' the item.

When the buyer settled the total price of the asset in the form of hire charges, the asset is transferred to the buyer.

Novtel manages 'Hire-Purchase' vehicles with ease.

- ✓ A Vehicle is classified as a 'Hire-Purchase' item and a monthly payment amount is added to the Vehicle Master File.
- ✓ A Contract is created in Contract Manager for the required period.
- ✓ Then, a payment schedule is set up, and the Customer is billed monthly for the selected period until the full outstanding amount has been settled.

The screenshot shows the 'Hire Purchase Payments' window. At the top, there are fields for 'Item' (A0011, Chev Spark), 'Supplier' (ABC001, ABC Company), 'Date Start' (01/09/2019), 'Date End' (31/08/2022), and 'Rate per Month' (3500.00). Below these fields is a table with the following columns: Date Start, Date End, Rate, Status, and Invoice #. The table contains 12 rows of data, with the first row highlighted in blue. The first row shows a date range from 2019-09-01 to 2019-09-30, a rate of 3500, a status of 'Invoiced', and an invoice number of PN102214. The subsequent rows show dates from 2019-10-01 to 2020-05-31, all with a rate of 3500 and a status of 'Not Invoiced'. At the bottom of the window, there is a yellow warning box that reads: 'The Recurring Billing process will only be available when interfaced with Pastel or Evolution.' and two buttons: 'Accept' and 'Cancel'.

Date Start	Date End	Rate	Status	Invoice #
2019-09-01	2019-09-30	3500	Invoiced	PN102214
2019-10-01	2019-10-31	3500	Not Invoiced	N/A
2019-11-01	2019-11-30	3500	Not Invoiced	N/A
2019-12-01	2019-12-31	3500	Not Invoiced	N/A
2020-01-01	2020-01-31	3500	Not Invoiced	N/A
2020-02-01	2020-02-29	3500	Not Invoiced	N/A
2020-03-01	2020-03-31	3500	Not Invoiced	N/A
2020-04-01	2020-04-30	3500	Not Invoiced	N/A
2020-05-01	2020-05-31	3500	Not Invoiced	N/A

13

The Pax System





The PAX System

Novtel Vehicle Hire Ultimate Enterprise 6.0.0.0 - [Item Grid]

File Edit Modify Setup Process Reports

DAILY TRIPS PLANNING

Type: Weekly Date Start: 2020/08/20 Time out: 9:27:11 am Passengers: 0 Pickup: Vehicle: Group: Client: Daily Date End: 2020/08/20 Time in: 9:27:11 am Drop-Off: Driver: Default Driver

Note: Only vehicles that is part of the "Pax System" will be available.

Scheduled Containers

BookingNum	Trip Type	Date Start	Date End	Time Out	Time In	Passengers	Pickup Address	Drop Off A
14431	Weekly	20 August 2020	20 August 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14432	Weekly	27 August 2020	27 August 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14433	Weekly	03 September 2020	03 September 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14434	Weekly	10 September 2020	10 September 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14435	Weekly	17 September 2020	17 September 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14436	Weekly	24 September 2020	24 September 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14437	Weekly	01 October 2020	01 October 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14438	Weekly	08 October 2020	08 October 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14439	Weekly	15 October 2020	15 October 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air
14440	Weekly	22 October 2020	22 October 2020	8:00 pm	2:00 pm	10	Cape Town Office	George Air

Clear List Remove Container

Finish Scheduled trips: 10 Book Containers

The Pax System is used to schedule trips for the transportation of a set number of people per vehicle from one location to another, in bulk.

The applicable vehicles are classified as a 'Pax item' and the maximum number of passengers are captured per vehicle – which cannot be exceeded when a trip is scheduled.

Trips can be scheduled on either a daily, weekly, or monthly basis. Or schedule an Ad-Hoc' trip when needed.

Novtel Vehicle Hire Ultimate Enterprise 6.0.0.0 - [Item Grid]

File Edit Modify Setup Process Reports Help

Reservation Number 14432

001 Stanton Travels
PO Box 7521
Sherton
Pretoria
0000
L Stanton@stavel.com

Mobile Phone 088 788 456 123
Fax 012 788 456 123
Telephone 012 788 456 123

Contact name
ID/ passport nr
Licence Nr
Local Contact Nr
User Defined Field 5

Cancelled
Provisional
Confirmed
On Rent
Termed
Non Rev
Non Rev Return
Pax Container

The Pax Container bookings are accessed individually to add a specific driver; add the kilometres at the start and end of the trip, as well as times of departure and arrival as it happened.

14

The Dashboard



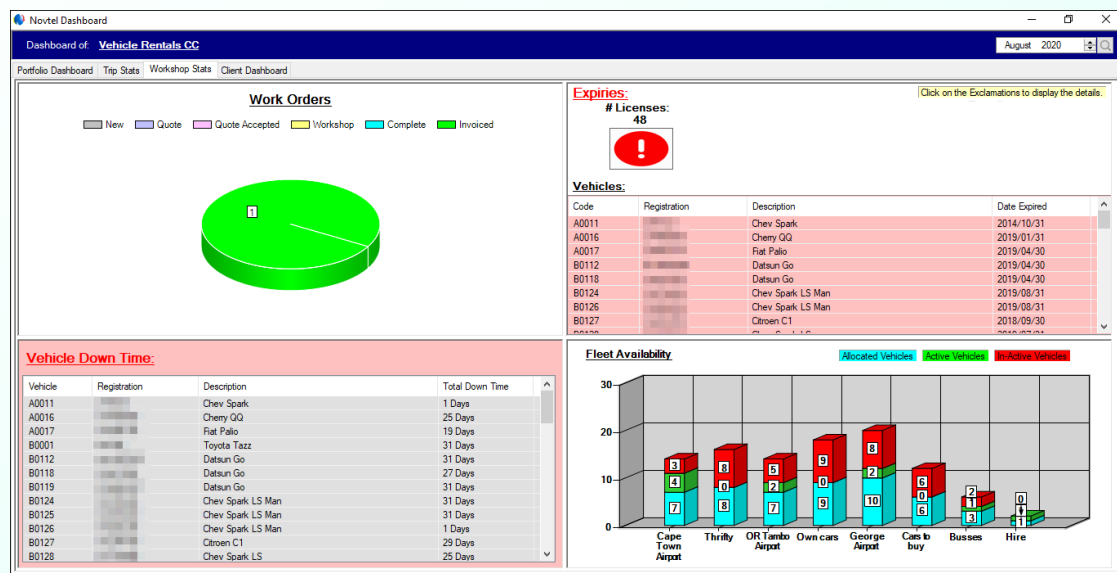
1. Portfolio Dashboard



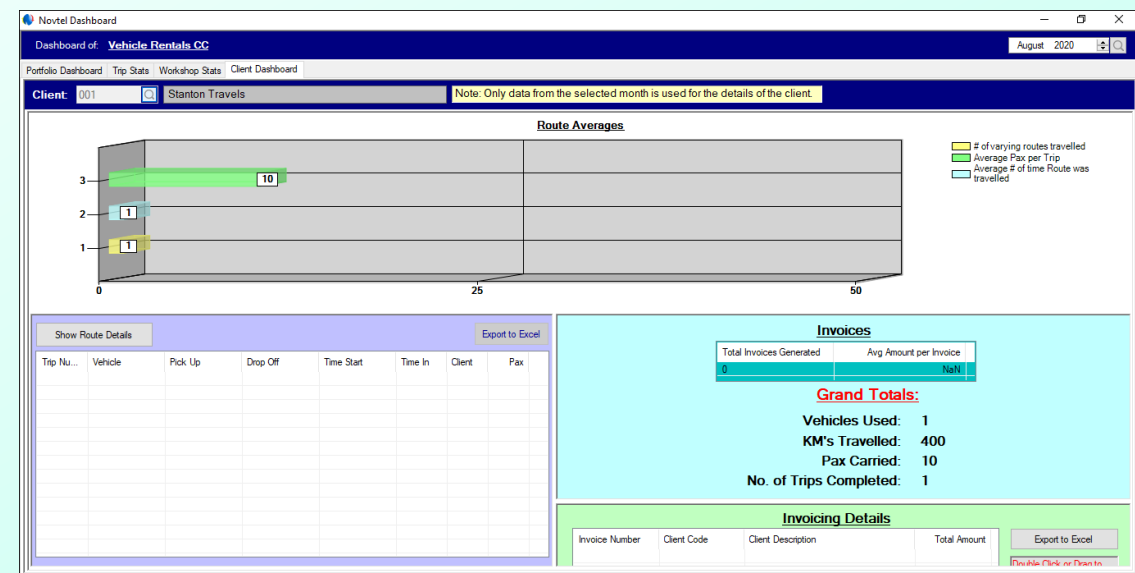


The Dashboard

3. Workshop Stats



4. Client Dashboard



Please do not hesitate to contact us for more information, and to request a quotation or product demo.

 **Novtel**
Property
Management



 **Novtel**
Hospitality Management



 **Novtel**
Equipment Hire



 **Novtel**
Relations
Management



 **Novtel**
Self-Storage



 **Novtel**
Vehicle Hire



 **Novtel**
The Invoice Module
and Job Tracker Utility
(For the Glass Cutting Industry)



 **Novtel**
Contract
Management



 **Novtel**
Bank Manager



 **Novtel**
Access Control



 **Novtel**
Property Management
Mobile Application

For Resolving Maintenance
Onsite and In your Time



 **Novtel** Relations Management Mobile App



 **Novtel**
The Invoicing App



 **Novtel**
The Online
Application
Website



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sales@novtel.com



www.novtel.co.za



086 166 8835